

eircom Home Sentiment Survey

Phase III

September 2013



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Introduction

The third eircom Home Sentiment Survey (eHSS) continues to blaze a trail and provide a unique insight and understanding into the usage and impact of technology on everyday Irish life. Commissioned by eircom, Ireland's largest telecommunications provider, the bi-annual survey is conducted by Behaviour & Attitudes and is conducted among 1,000 Irish households. This survey aims to record the social changes experienced in Ireland, as a result of technology and innovation.

Previous eHSS surveys reported on the increased desire amongst the Irish population to stay constantly connected. The increase in both ownership and usage of online-enabled digital devices across the country was indicative of this trend.

Amongst the wide-ranging findings from the latest eircom Home Sentiment Survey (eHSS), is an increased reliance on technology to get by. We now rely on apps to assist us in our everyday lives; from health and fitness to travel and news, the app is firmly at the heart of everyday living in Ireland. The findings also report on the practice of "media stacking" amongst young people, the act of engaging across numerous digital devices simultaneously. Paradoxically, the latest eHSS report also reports that a third of us are confused by technology and are arguably being left behind in our new digital age.

The full report will be available online at www.eircom.net/pressroom from 9am Monday 9th September 2013.



Key Themes

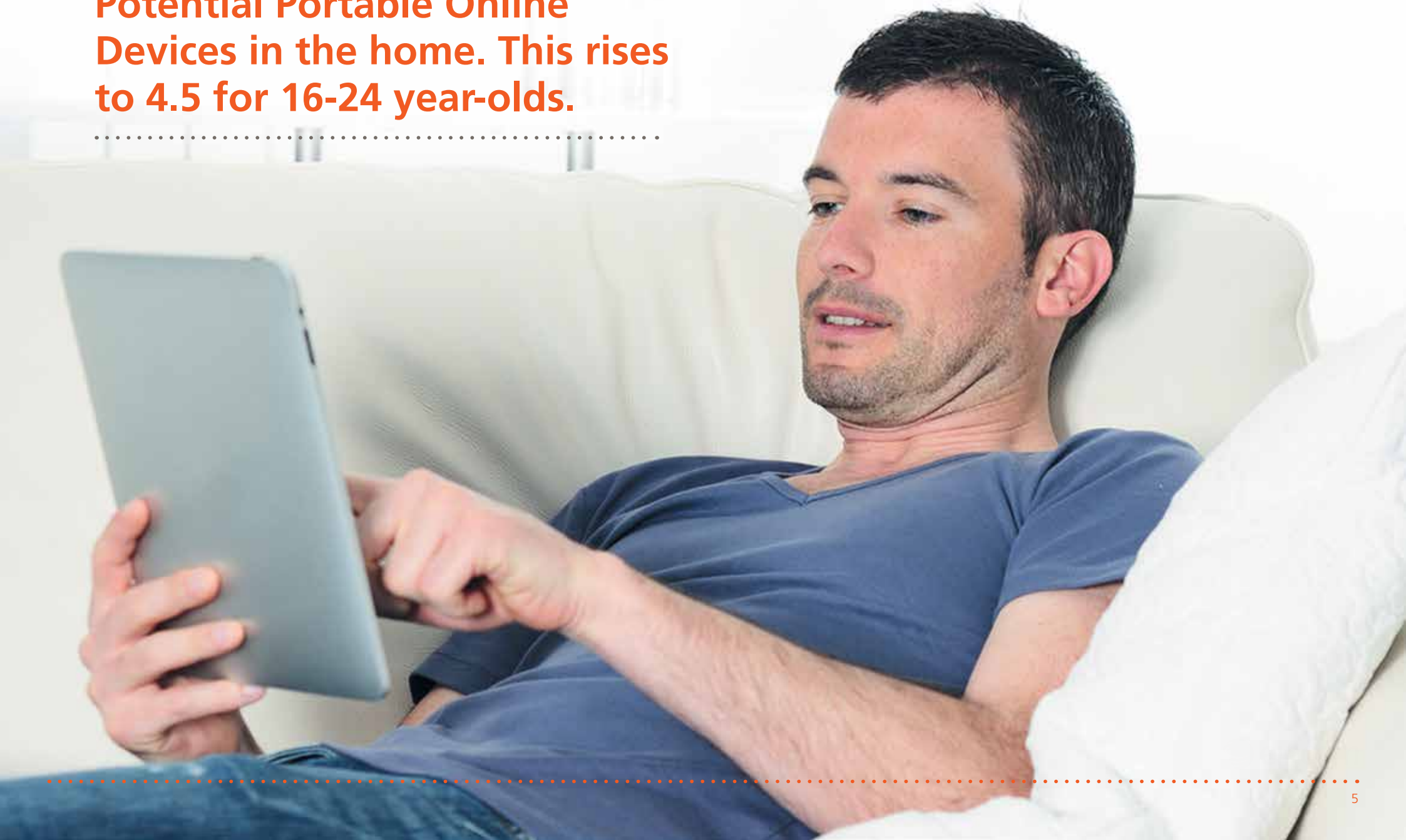
1. The juggernaut of on-the-go portable devices continues

79% of adults have a portable online device which can be used on-the-go



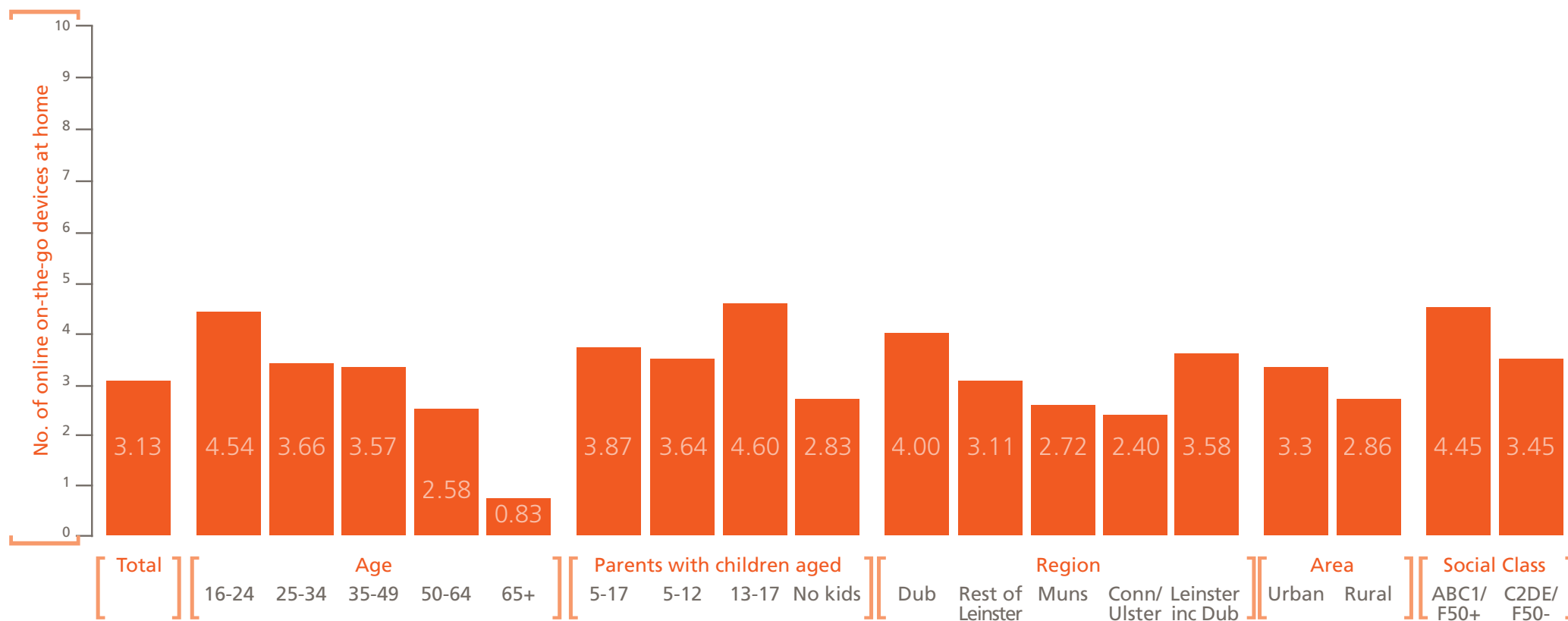
3 is the average number of Potential Portable Online Devices in the home. This rises to 4.5 for 16-24 year-olds.

.....



On average adults have access to 3 portable online on-the-go devices at home

Highest access to potential online on-the-go devices at home is among 16-24s, Dubliners, middle class families and those with children aged 13-17 years in the household.



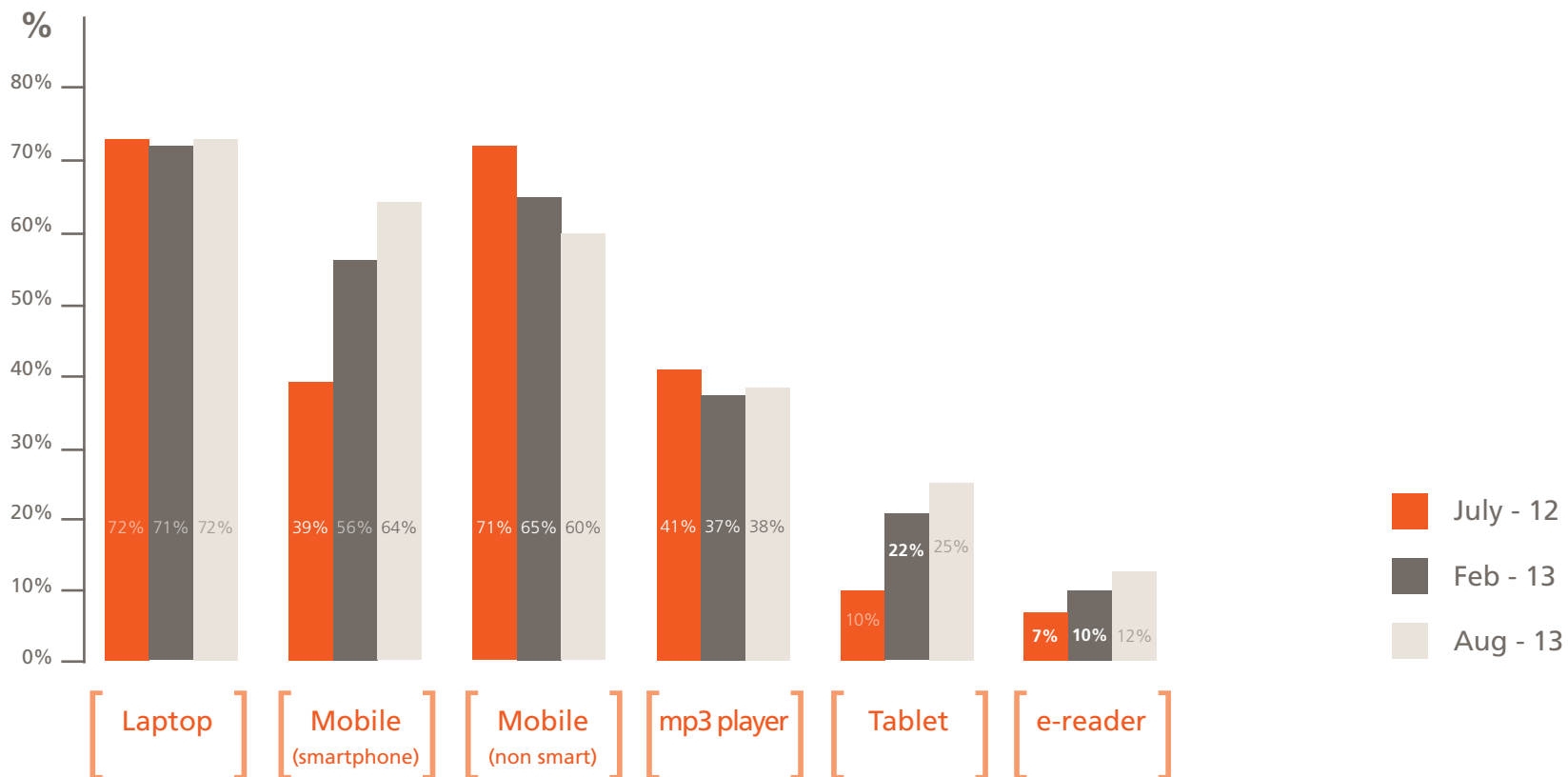
Question

How many on-the-go portable online devices are in the household?

Access to portable on-the-go devices continues to grow

Growth especially from more blue-collar households for tablets.

Any Device in Household



Which of the following devices are in your household? It does not matter who owns them in the household.

Devices in the household by region & socio-economic status

Base: All adults 16+ - 1003

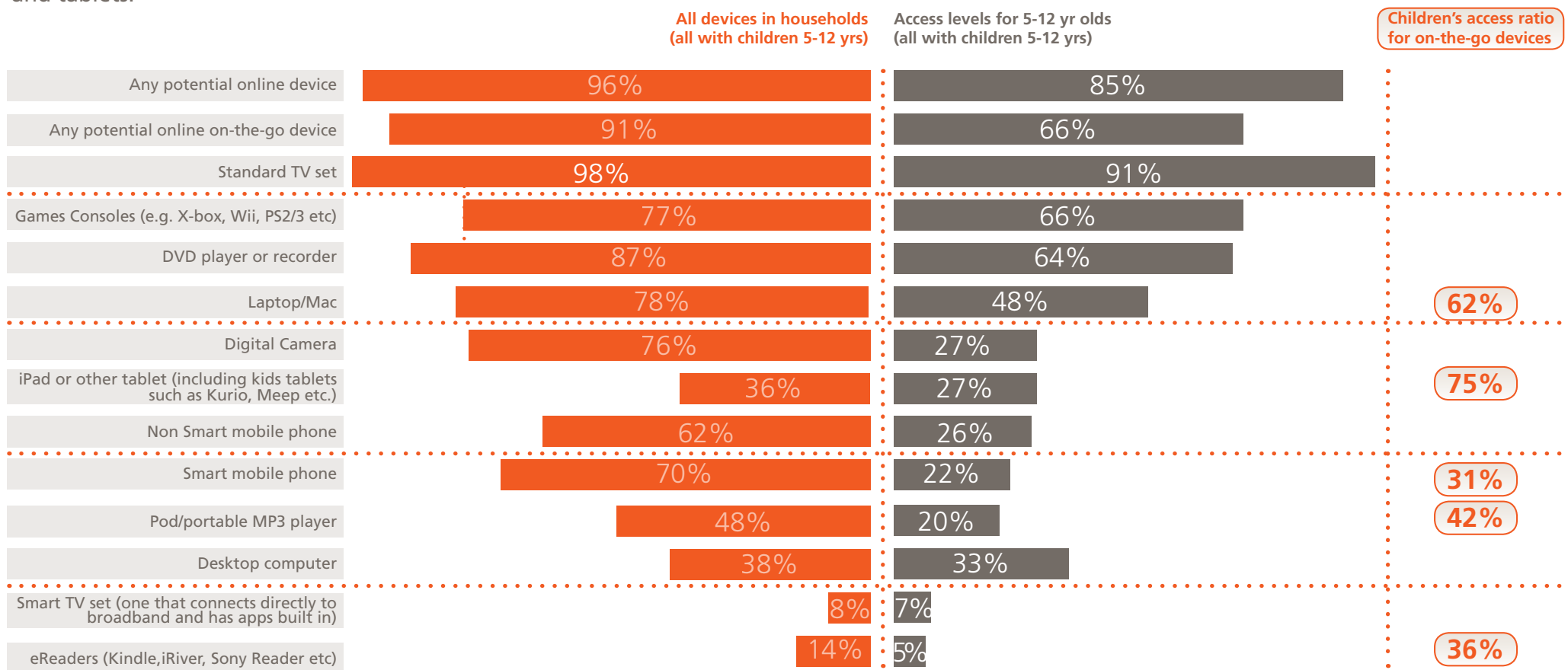
	Total	Social Class		Region				Leinster (inc. Dublin)	Area	
		ABC1/F50+	C2DE/ F50-	Dublin	Leinster	Munster	Conn/Ulster		Urban	Rural
Base:	1003	513	490	252	272	292	187	524	524	630
	%	%	%	%	%	%	%	%	%	%
- ANY Potential Online Device	83	90	77	89	85	79	76	87	84	82
- ANY Potential On The Go Device	79	85	75	85	83	76	72	84	80	78
Standard TV set	96	95	97	97	97	97	94	97	96	97
DVD Player or recorder	77	80	75	84	81	73	69	82	80	73
Laptop/Mac	72	78	66	75	77	67	66	76	71	72
Mobile phone (not a smart one)	64	62	66	61	64	63	69	63	63	65
Digital Camera	61	71	53	70	63	55	55	67	62	60
Smart mobile phone	60	68	52	69	60	53	53	65	61	58
Games Consoles (e.g. X-box, Wii, PS2/3 etc.)	44	44	44	46	52	42	34	49	46	41
iPod/portable MP3 Player	38	45	33	48	41	33	28	45	41	35
Desktop computer	31	42	21	37	27	28	29	32	28	34
iPad or other tablet (including kids tablets such as Kurio, Meep etc.)	25	30	20	31	28	20	16	30	25	24
eReaders (e.g. Kindle, iRiver, Sony reader etc.)	12	18	8	20	14	6	9	17	13	12
Smart TV set (one that connects directly to broadband and has apps built in)	8	9	6	12	4	5	9	8	9	6

Question

Which of the following do you have in your household?

2 in 3 parents of children aged 5-12 years allow access to a portable online device

About half of 5-12 year-olds have access to a laptop, one quarter a tablet and similar proportions to a smartphone. The highest ratio of children's usage relative to access for on-the-go devices is for laptops and tablets.

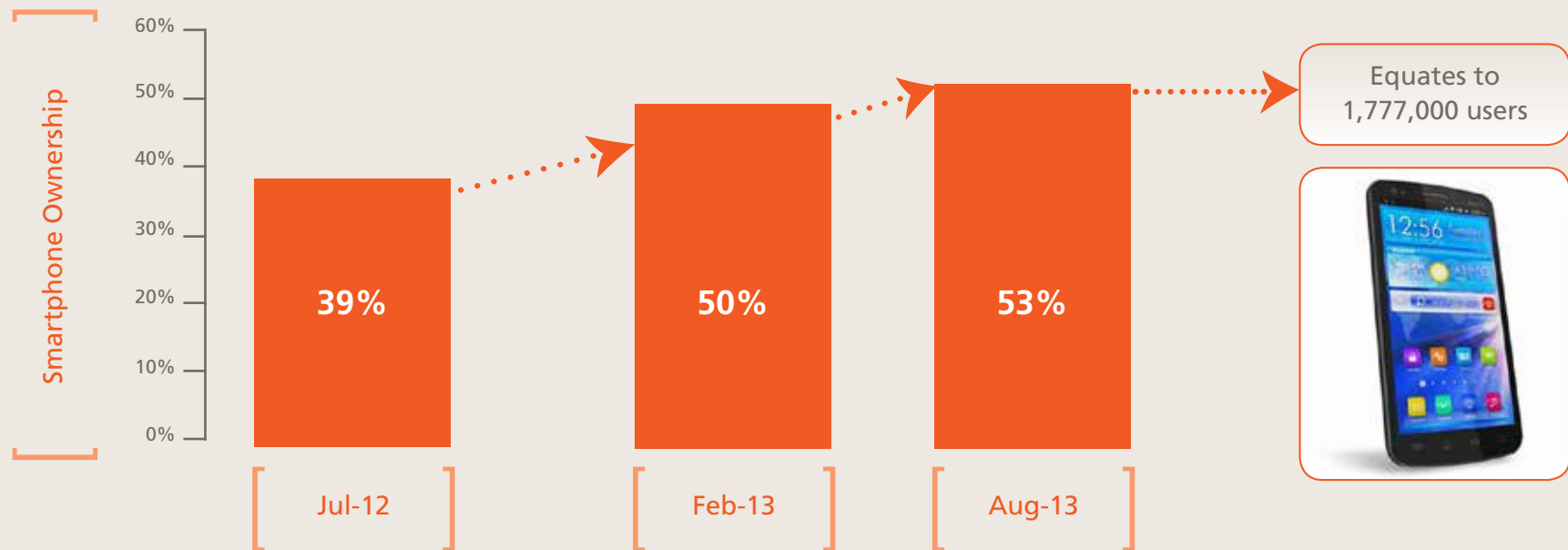


Question Which of the following do you have in your household?

Question Which of the following devices do any of your children/child aged 5-12 years use or have access to?

Smartphone ownership continues to grow

Base: All with mobile



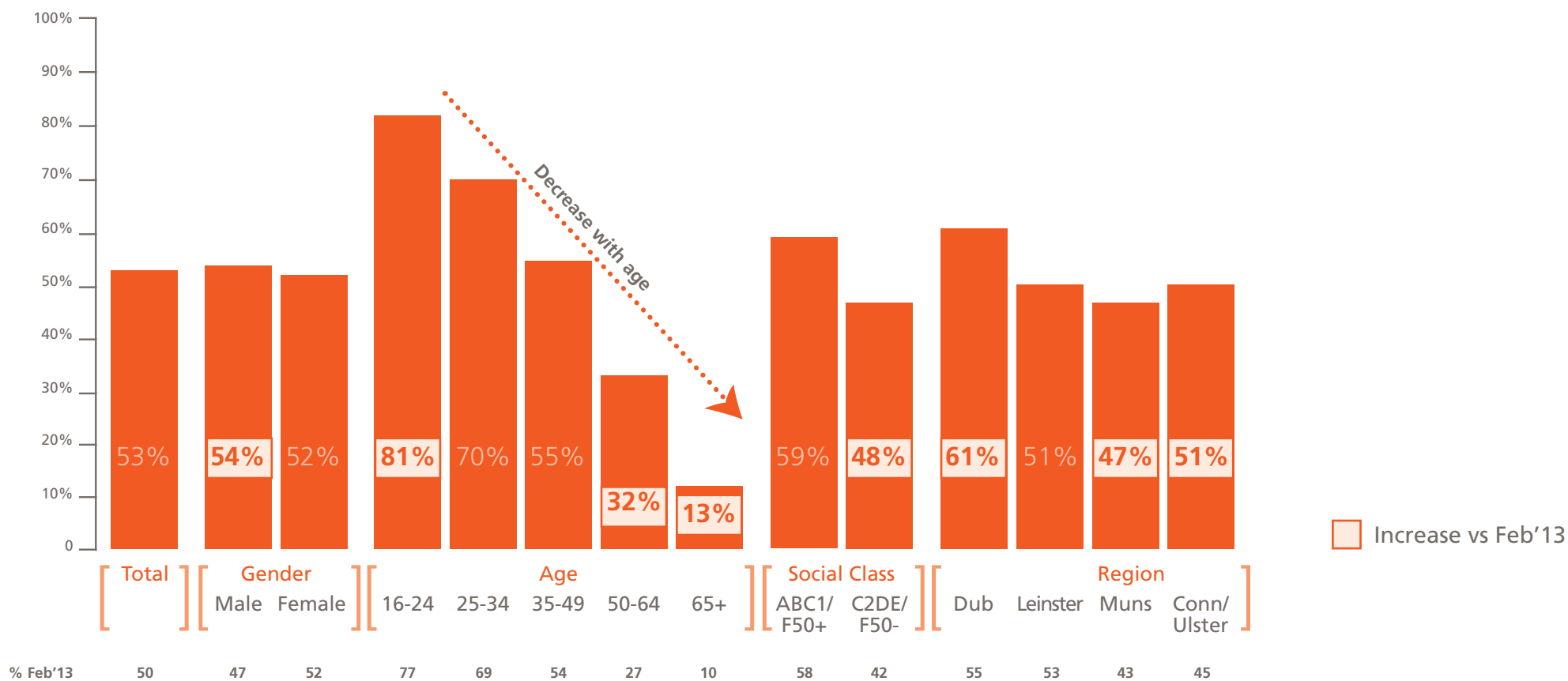
Question

And which of the following types of mobile phone handsets is your main one? A smartphone is a device that lets you not only make telephone calls and send texts, but also has features that you might find on a computer such as the ability to send and receive e-mail, edit office documents, download apps, take and edit photos, get driving directions via GPS, create a playlist of digital tunes etc

Who now owns a smartphone?

Growth evident amongst males, 16-24 and 50+, blue-collar sector and across the regions (in the main).

Base: All with mobile - 947



Question

And which of the following types of mobile phone handsets is your main one? A smartphone is a device that lets you not only make telephone calls and send texts, but also has features that you might find on a computer such as the ability to send and receive e-mail, edit office documents, download apps, take and edit photos, get driving directions via GPS, create a playlist of digital tunes etc

Access to portable on-the-go devices will continue

.....

25% now have access to a tablet
(870,000 adults 16+)

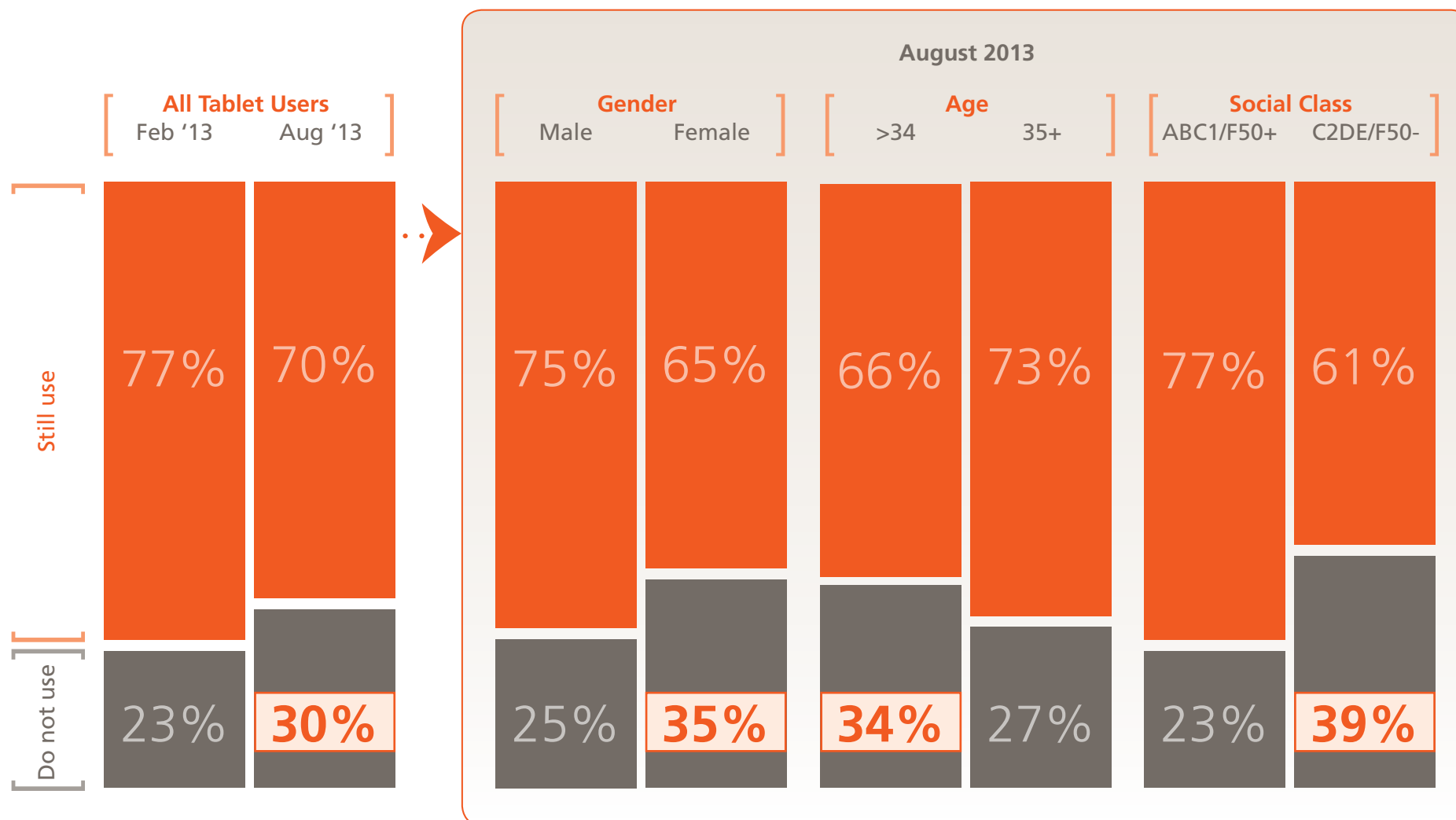


17% of those without a tablet are likely
to get one this year (450,000 adults 16+)



Thus, potential for **1,320,000** adults to
have access to a tablet by year end

Tablet users increasingly likely to ditch laptops/desktop – driven by younger, blue collar and females



■ Increase vs Feb'13

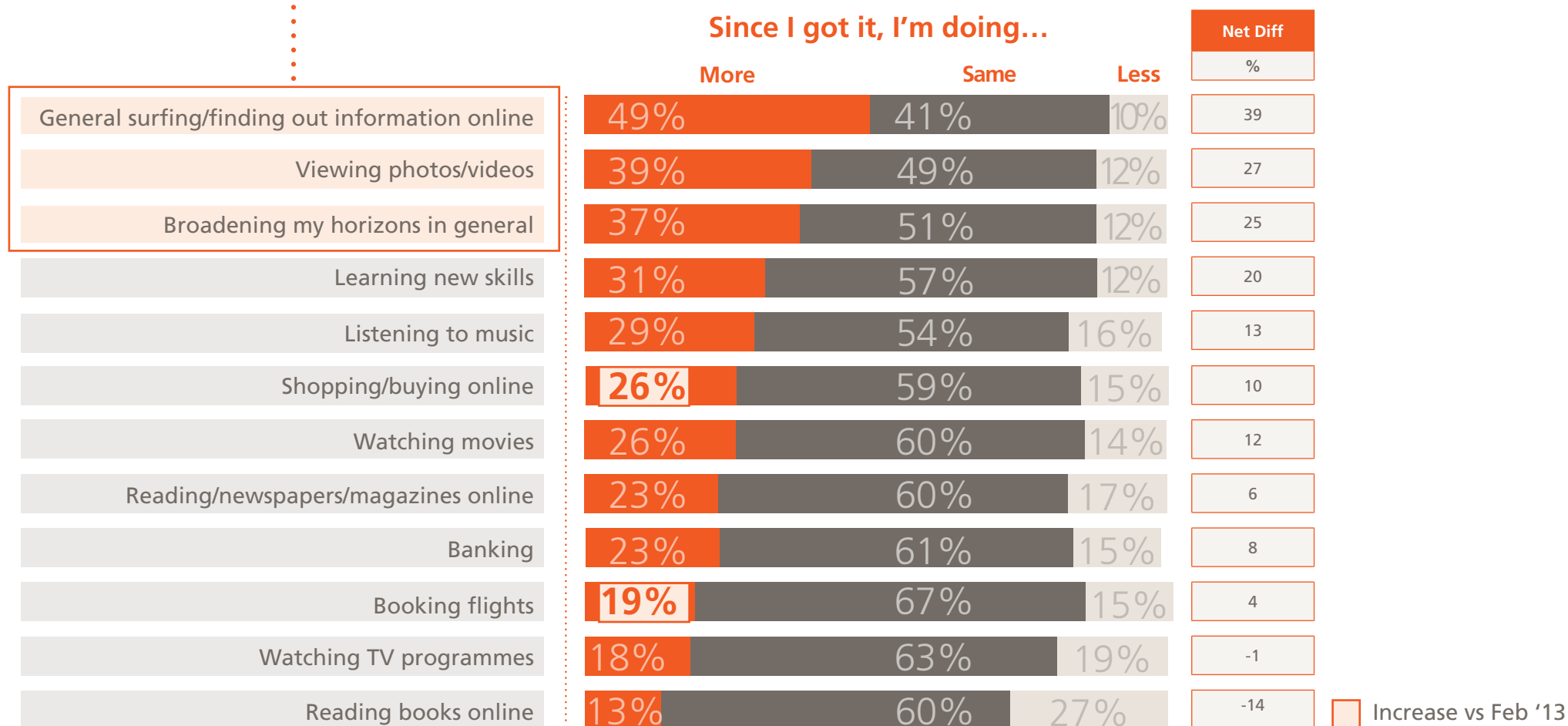
Question

Since getting your tablet/iPad, do you also still use a laptop or desk top computer for personal use (i.e. excluding what's available in work/school/college)?

Positive impact of tablet/iPads

Base: All have tablet/iPad

Sense of personal discovery for tablet users.
Also, more shopping and booking flights vs Feb '13.



Question

Since you got your tablet/iPad which of the following are you doing more of, less of, or the same amount?

With access to so many portable on-the-go devices, we do a lot online nowadays, especially 16-24 year-olds

Base: All adults 16+ - 1003

One third of adults 16+
now Skype



Half the population buys
flights online



31% of 16-24s listen to the radio
online (via app/website)



40% of 16-24s play games
online with others



44% of 16-34s buy
clothes online



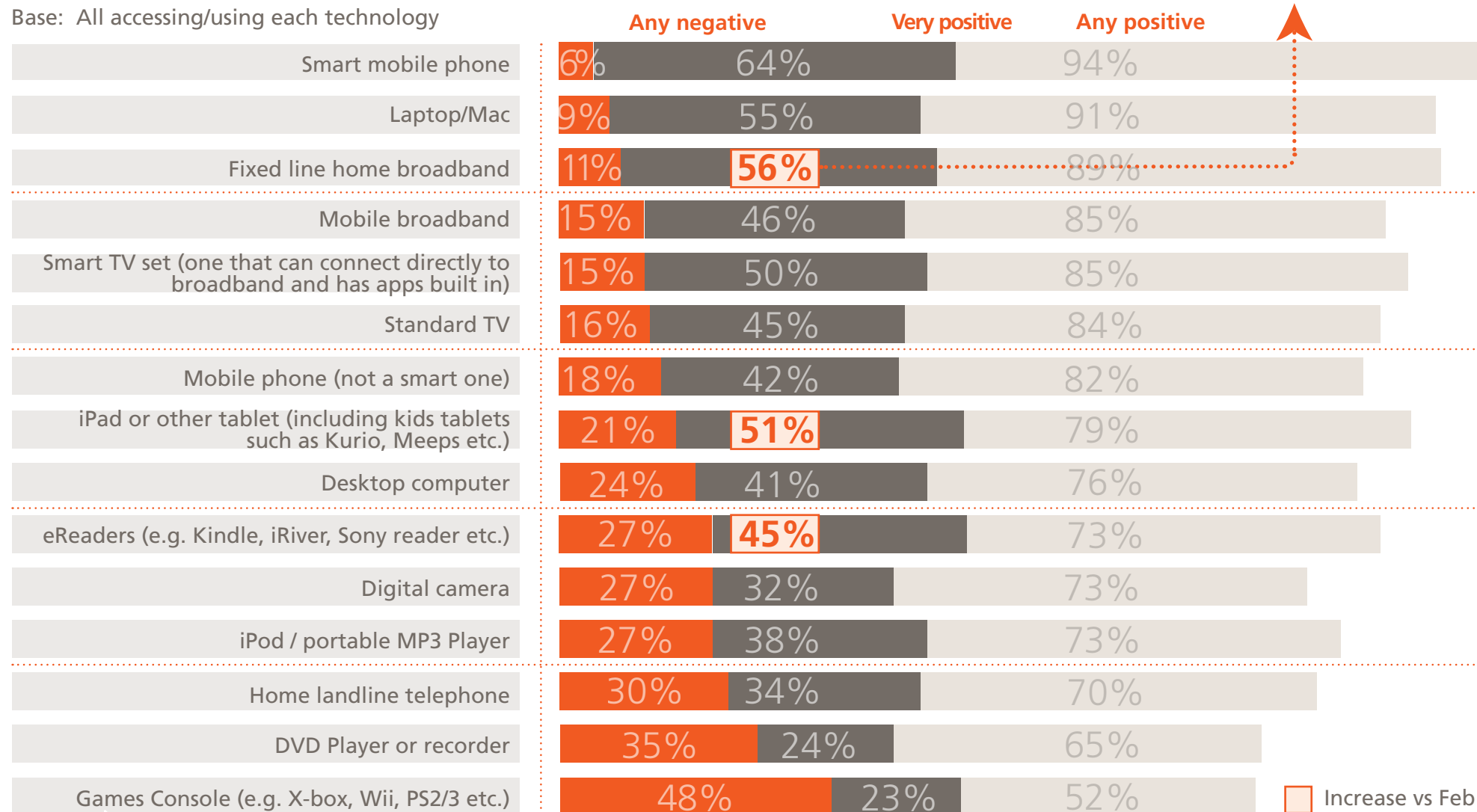
1 in 3 adults watch
On Demand TV



Fixed line home broadband, Tablets and eReaders have increased in positivity – however half of respondents rate games consoles negatively

Increase in positivity
(was 52% in Feb '13)

Base: All accessing/using each technology



□ Increase vs Feb '13

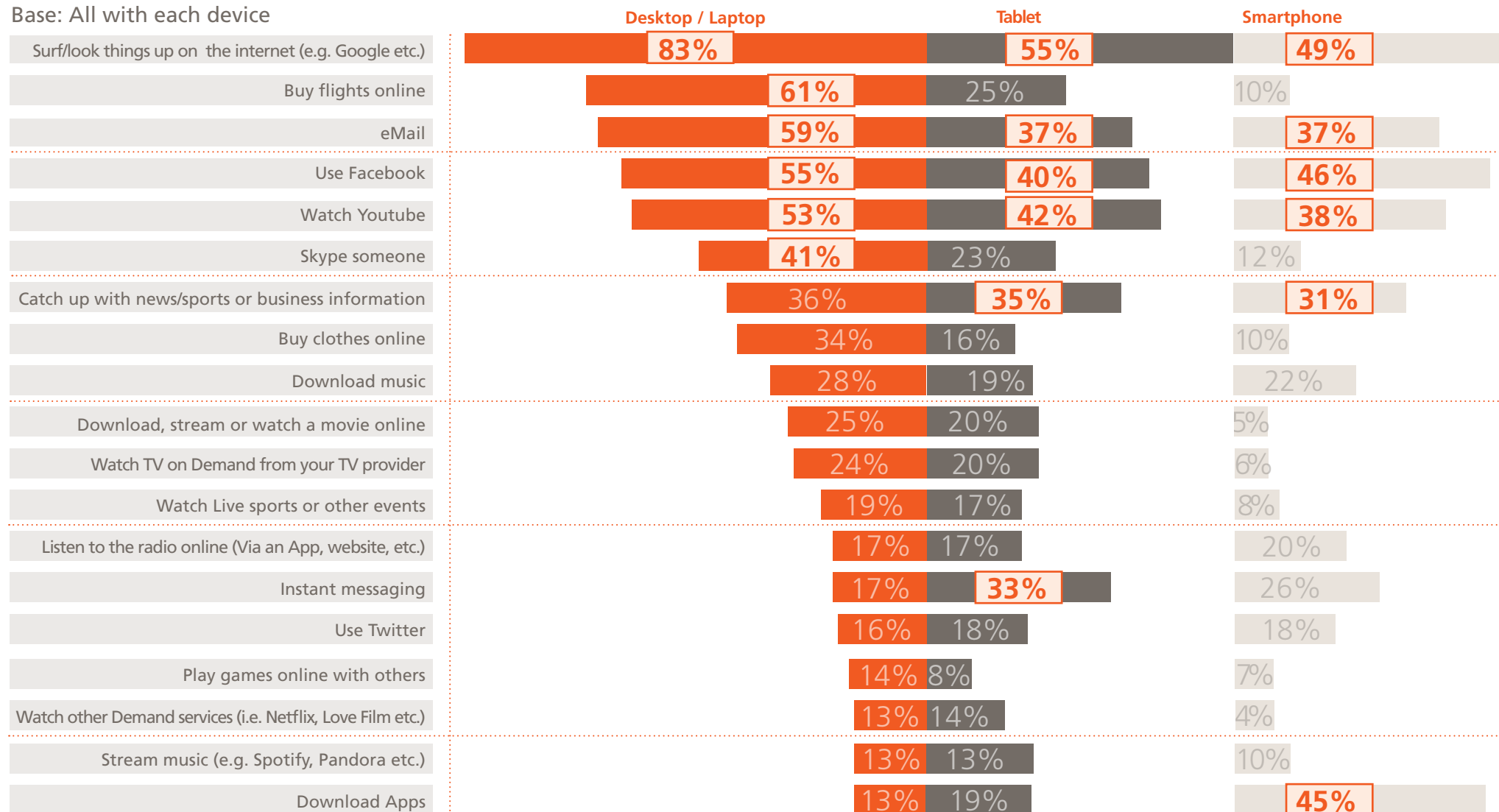
Question

Considering the technology you have access to, please rate the impact of it on your life?



What we access via each device

Base: All with each device



 Increase vs Feb '13

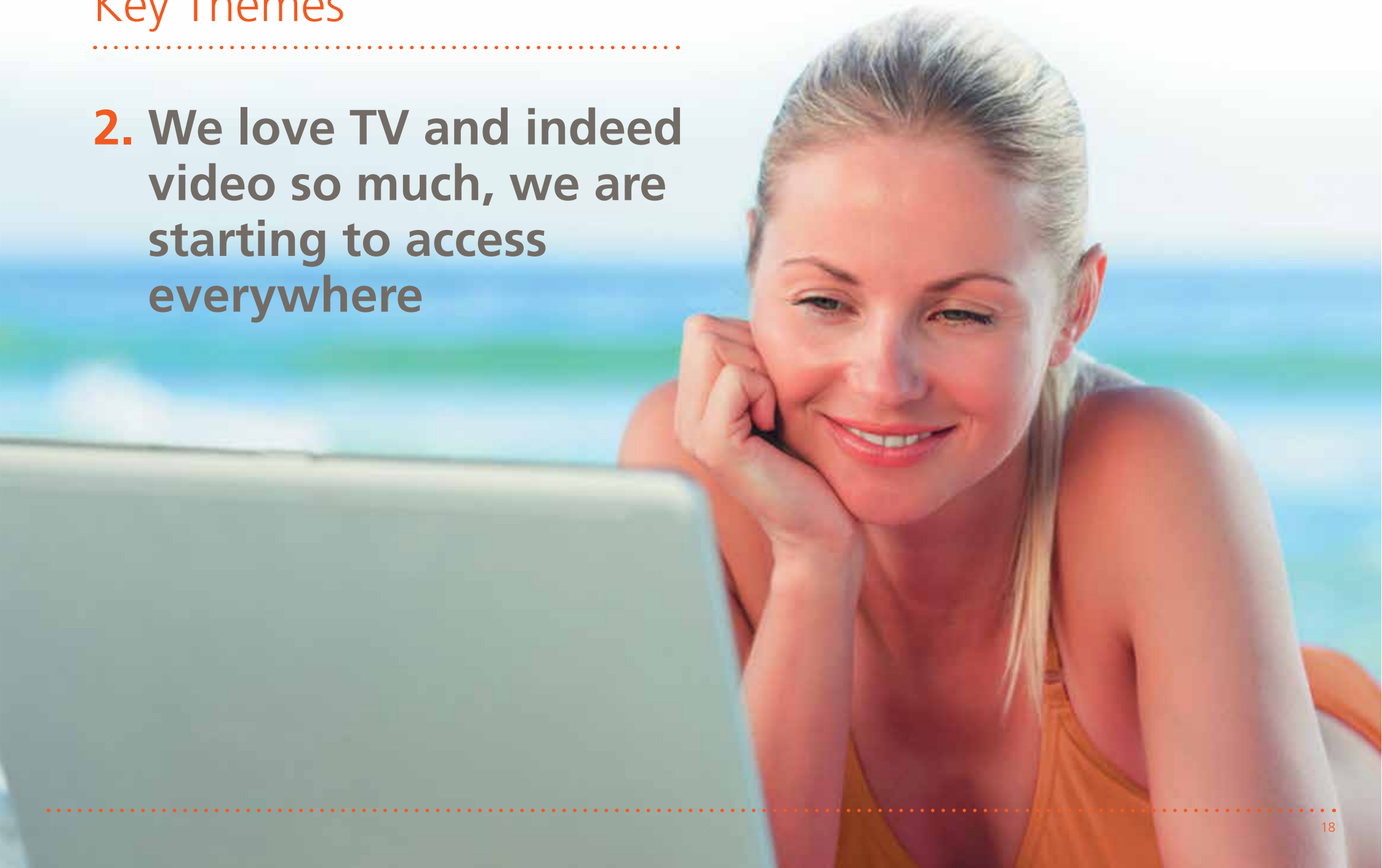
Question

Which, if any, of these devices are used by you to access each of the following aspects of multimedia entertainment? Tell me all that apply.



Key Themes

2. We love TV and indeed video so much, we are starting to access everywhere



**2 is the average number of TVs
and also the average number of
smartphones in the home**

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TV is vital to the home, but how we access it is changing

.....

96% have access to a TV



63% have more than one TV in the household



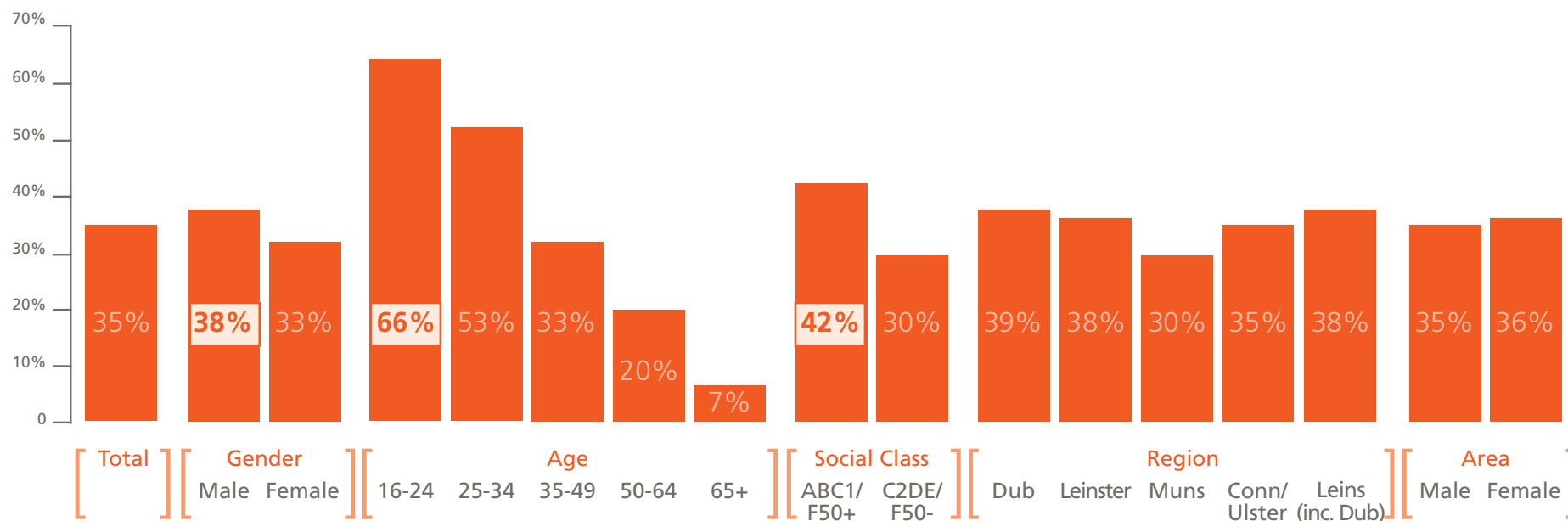
8% now have access to a Smart TV



35% now use a portable device to watch TV in the household (66% of 16-24s)



One third use any portable device to watch TV at home. This rises to 66% of 16-24s.



	Total	Gender		Age					Social Class		Region					Area	
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1/F50+	C2DE/F50-	Dublin	Leinster	Munster	Conn/Ulster	Leinster (inc. Dublin)	Urban	Rural
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Portable devices																	
Laptop	26	28	24	43	44	23	14	5	31	21	26	31	20	27	28	25	27
Smartphone	15	17	14	33	22	14	6	3	19	12	17	12	15	18	14	16	14
iPad/Tablet	8	8	8	16	8	8	7	1	12	5	11	10	5	6	10	8	8
Non Portable Device																	
Desktop Computer	5	4	5	6	6	4	4	1	6	3	5	4	4	5	4	5	4

 Increase vs Feb '13



Do you ever watch any TV or even snippets of TV in the following places in your home via any of these devices?



Location, location, location

83% watch TV set in living room.
Also 23% watch TV via a portable device in the living room (as many as in the bedroom)



One third of adults watch TV via a TV set in the bedroom – but one quarter (24%) also access TV here via a portable device



One third (36%) watch TV via a TV set in the kitchen (18% via a portable device)



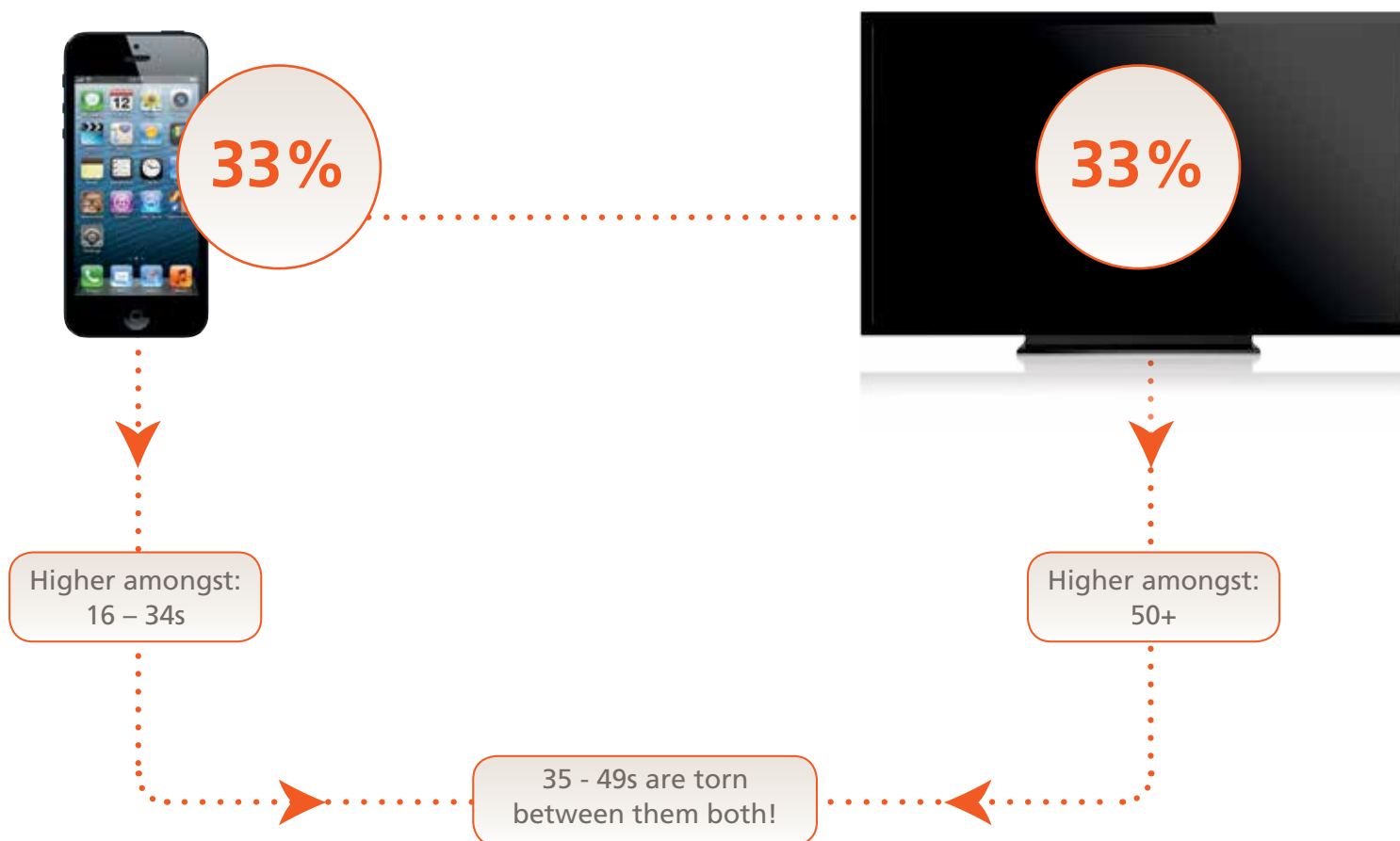
11% access TV in the car outside the house via a portable device



6% access TV via a portable device in the toilet (Smartphone)



If you could only pick one device to use for a month, which would it be?

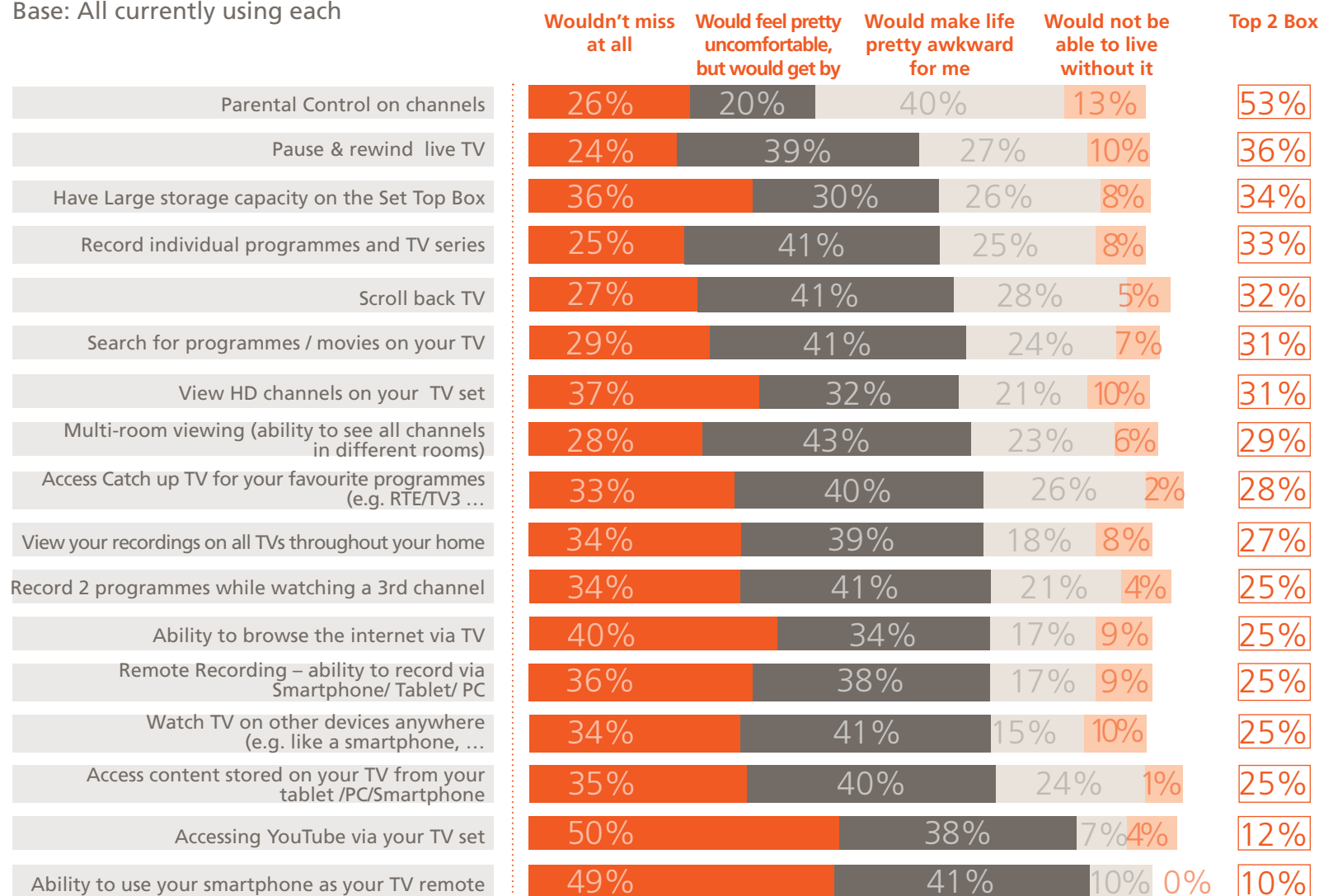


Question

If you could only pick one of the following to use for a month which would it be?

Apart from Parental Controls, Pause & Rewind Live TV edges ahead on the most important aspect of TV

Base: All currently using each

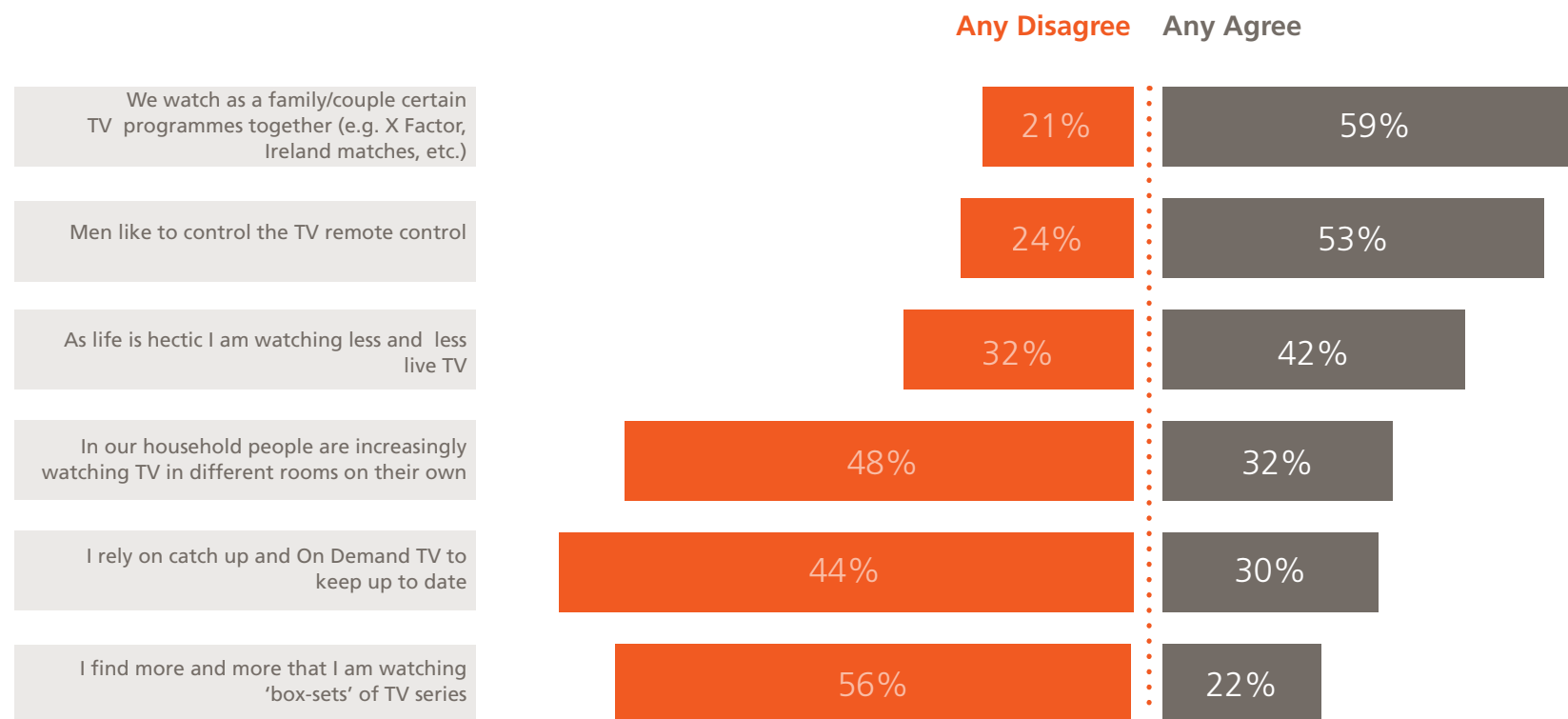


Question

If you were no longer able to use the following aspects of your TV service please indicate how you would feel about each?

While family viewing is still important, one third feel that people are increasingly watching TV in a different room on their own

Base: All adults 16+ - 1,003



Question

Now for some questions on your TV habits – be honest to what extent do you agree or disagree with each of the following.

Do Dublin households need family entertainment TV programmes to 'glue' the family together?

	Total	Gender		Age					Region					Area	
		Male	Female	16-24	25-34	35-49	50-64	65+	Dublin	Leinster	Munster	Conn/ Ulster	Leinster (inc. Dublin)	Urban	Rural
Base:	874	416	458	136	174	247	191	125	243	220	241	170	524	565	309
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
We watch as a family/couple certain TV programmes together (e.g. X Factor, Ireland matches, etc.)	59	57	61	53	62	71	55	40	68	55	52	60	62	59	58
Men like to control the TV remote control	53	46	59	57	57	56	51	40	61	42	55	54	52	58	46
As life is hectic I am watching less and less live TV	42	39	45	50	50	50	35	15	49	35	39	45	42	41	43
In our household people are increasingly watching TV in different rooms on their own	32	35	29	44	32	33	33	18	39	31	27	30	35	33	31
I rely on catch up and On Demand TV to keep up to date	30	30	30	35	38	37	23	7	38	26	22	34	32	31	28
I find more and more that I am watching 'box-sets' of TV series	22	23	21	35	37	24	14	8	24	16	20	29	20	21	22

Question

Now for some questions on your TV habits. To what extent do you agree or disagree with each of the following...?

57% of time watching TV claimed to be with others

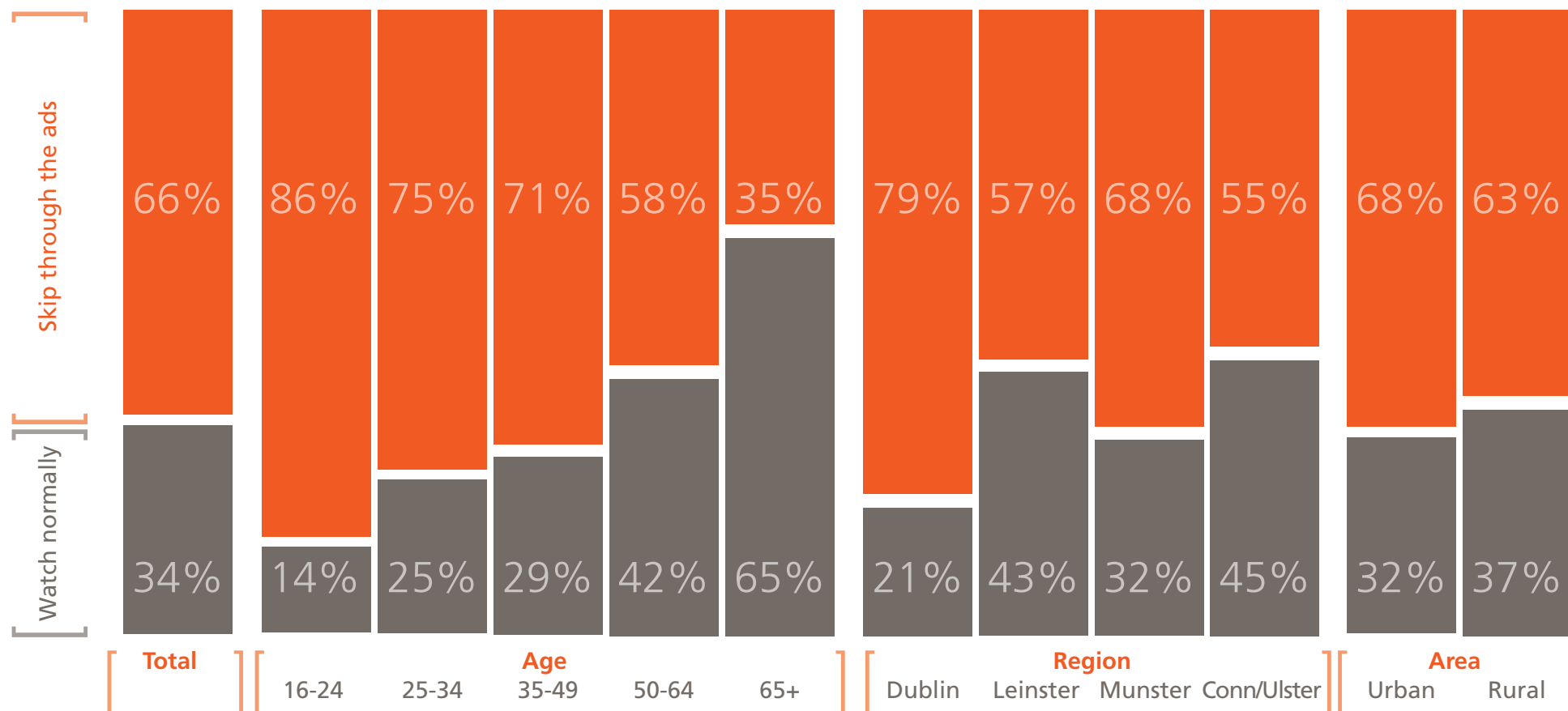
	Total	Age		Region					Area		Parent of kids	
		-34	35+	Dublin	Leinster	Munster	Conn/ Ulster	Leinster (inc. Dublin)	Urban	Rural	5-12 yrs	13-17yrs
	%	%	%	%	%	%	%	%	%	%	%	%
On your own	43	40	44	46	42	41	42	44	44	41	26	29
With partner	28	22	32	30	27	27	28	29	28	28	30	28
With family	22	26	20	17	23	26	21	20	21	24	39	39
With friends	6	11	3	5	7	6	8	6	6	7	3	4

Question

On an average week, please give us an approximate percentage split of your time watching TV which is ...

2 in 3 claim to skip through ads on recorded TV

Base: All respondents



Question

When you record TV do you tend to skip through the advertising or do you just watch it as normal?

Key Themes

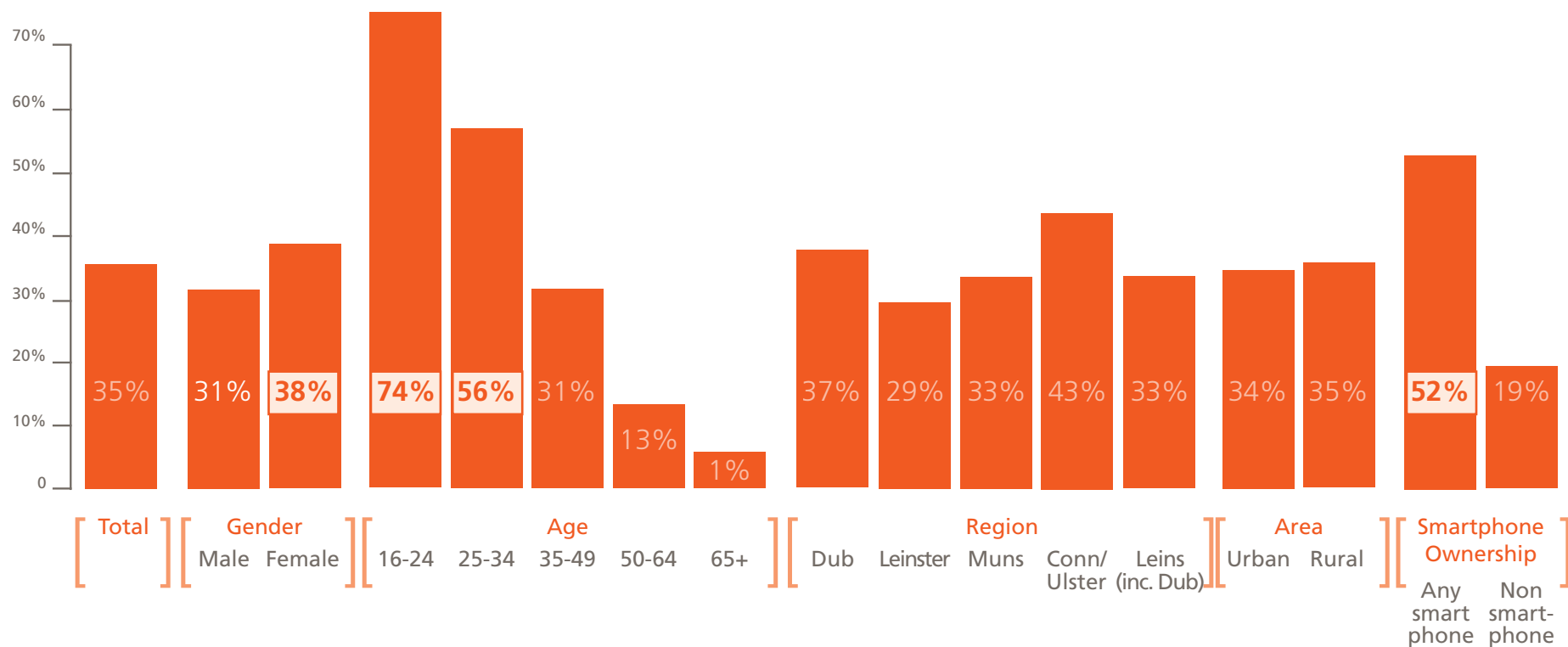
3. Media stacking the norm for youth



The youth (16-34s) media stack nowadays

Base: All adults 16+ - 1003

% AGREE: 'I often Facebook/Tweet friends while watching TV'



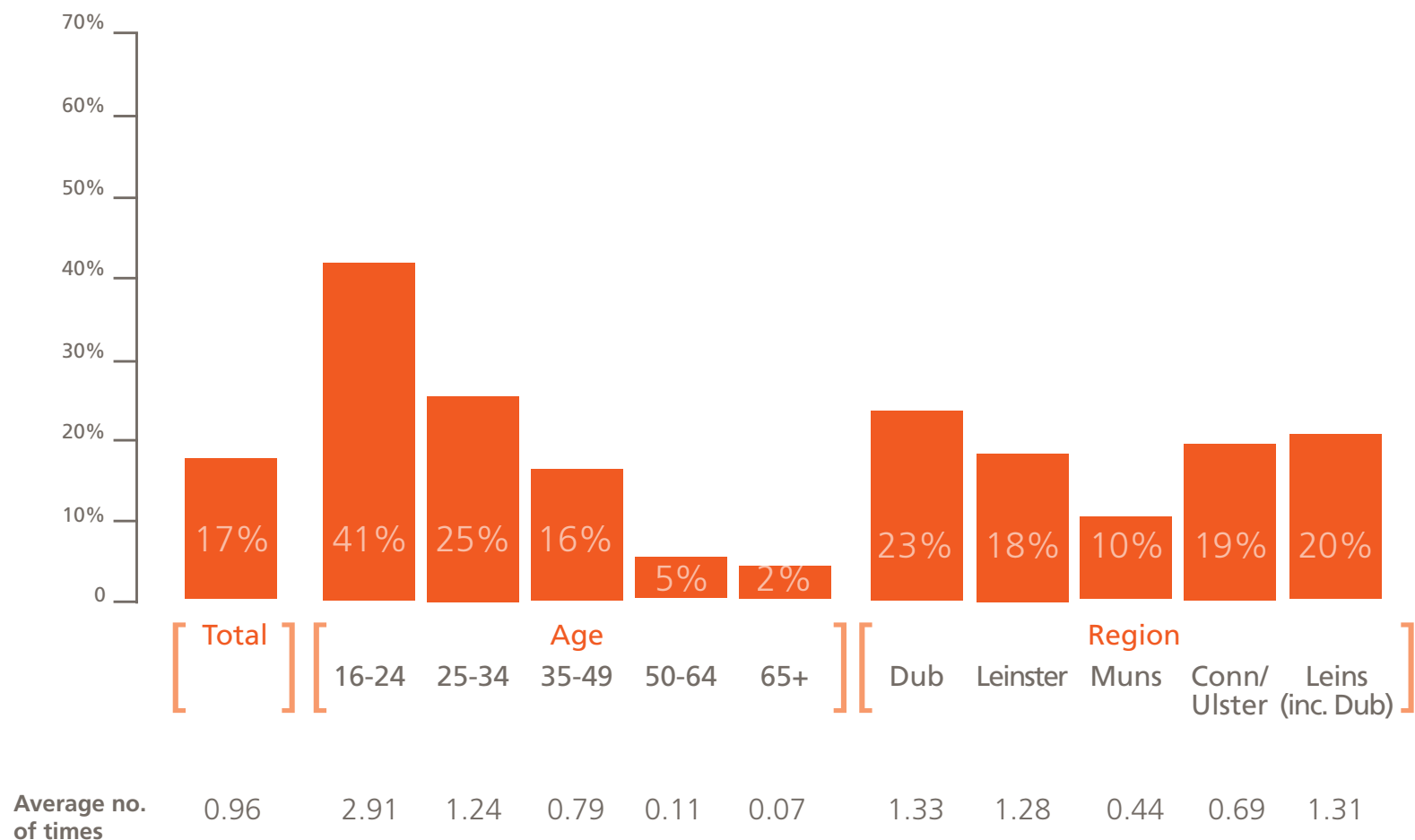
□ Increase vs Feb '13

Question

To what extent do you agree or disagree with each of the following statements about social media such as Facebook/Twitter etc.

41% of 16-24s have shared a TV video clip/news story with someone/group of people in the past week – on average 2-3 times

Base: All adults 16+ - 1,003

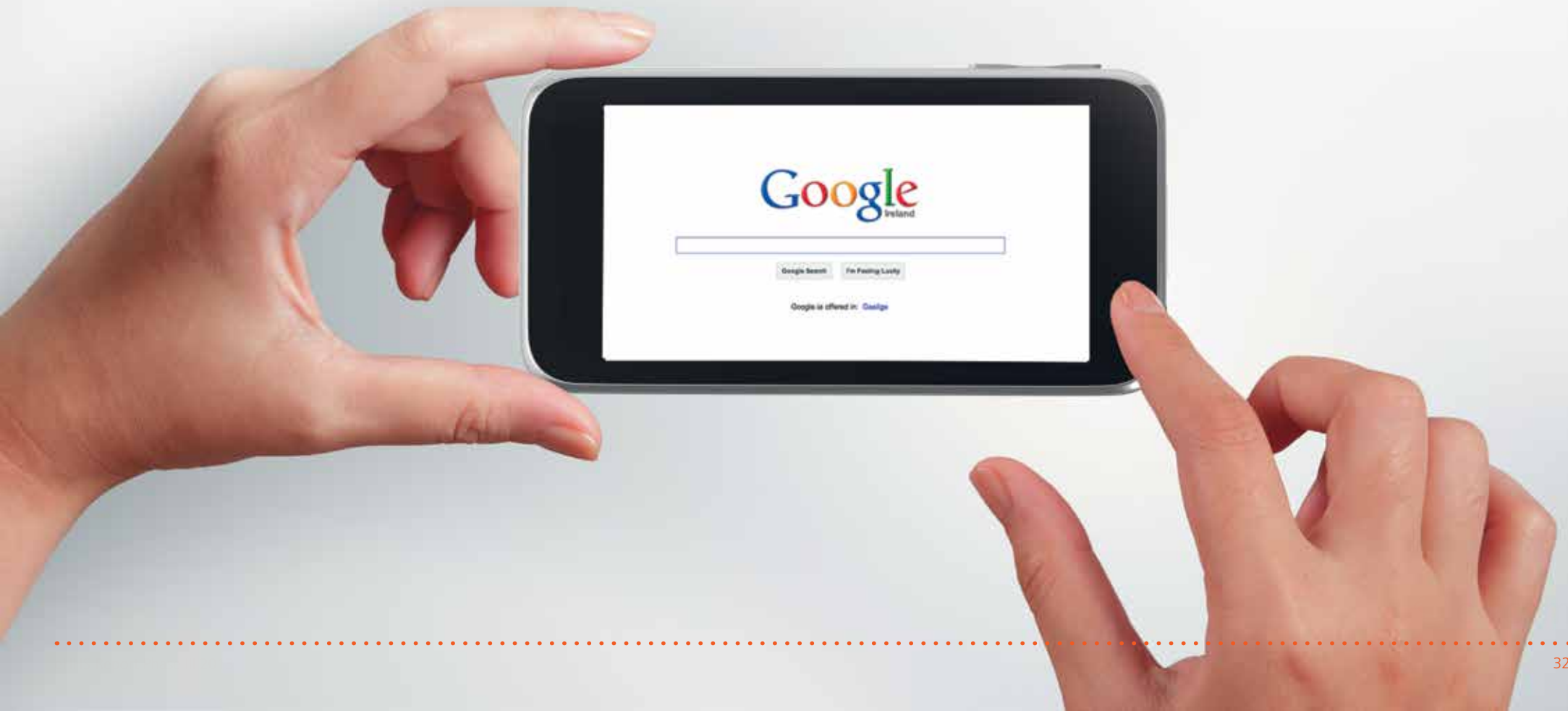


Question

In the past week about how many times have you shared a TV video clip or news story with someone or a group of people?

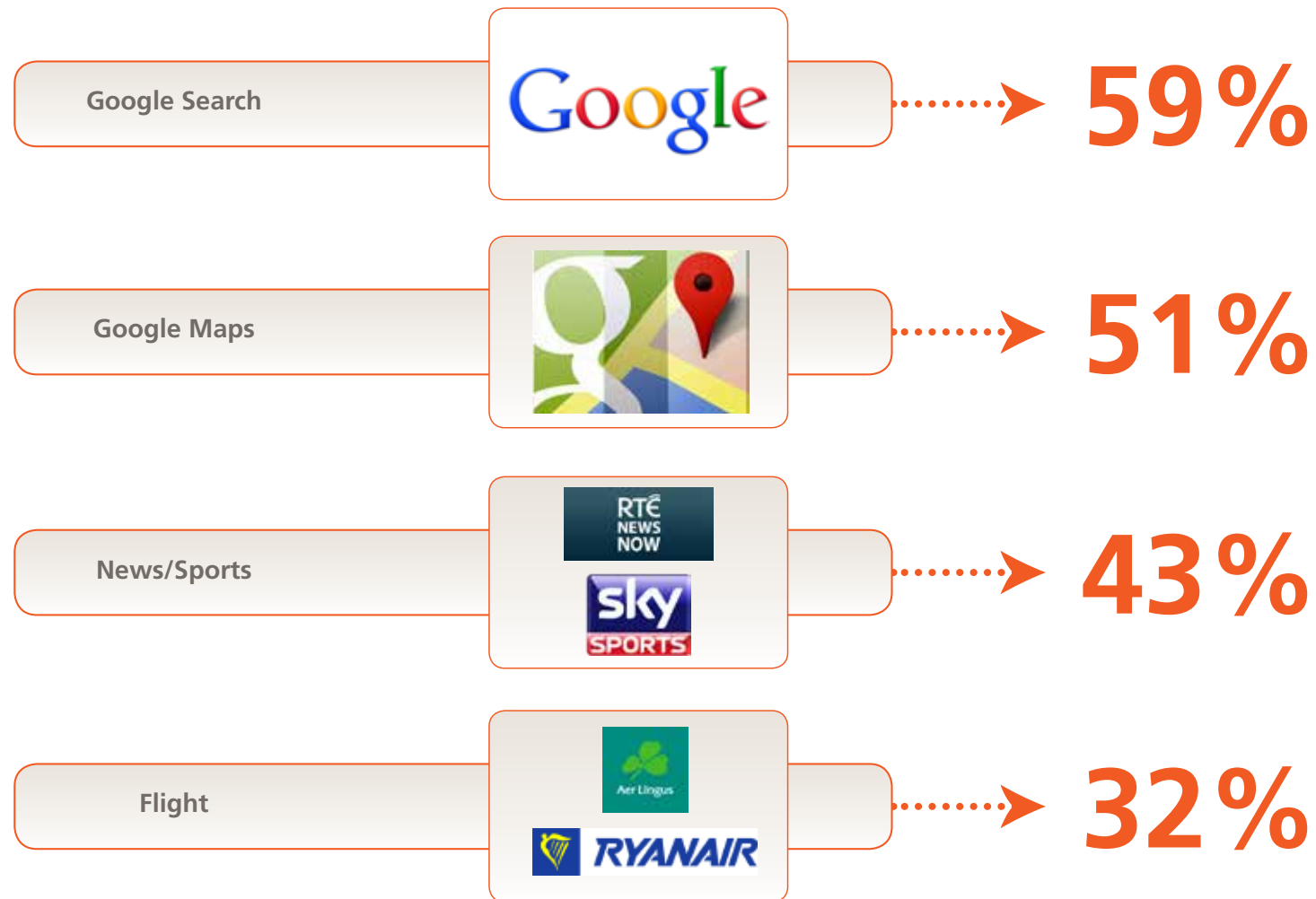
Key Themes

4. Google is now our travel companion



Google is our travel companion when we're away

Base: All with apps - 440



Question

When you are away (i.e. out of Ireland) do you use any of the following?

Google is our travel companion when we're away

Base: All with apps - 440

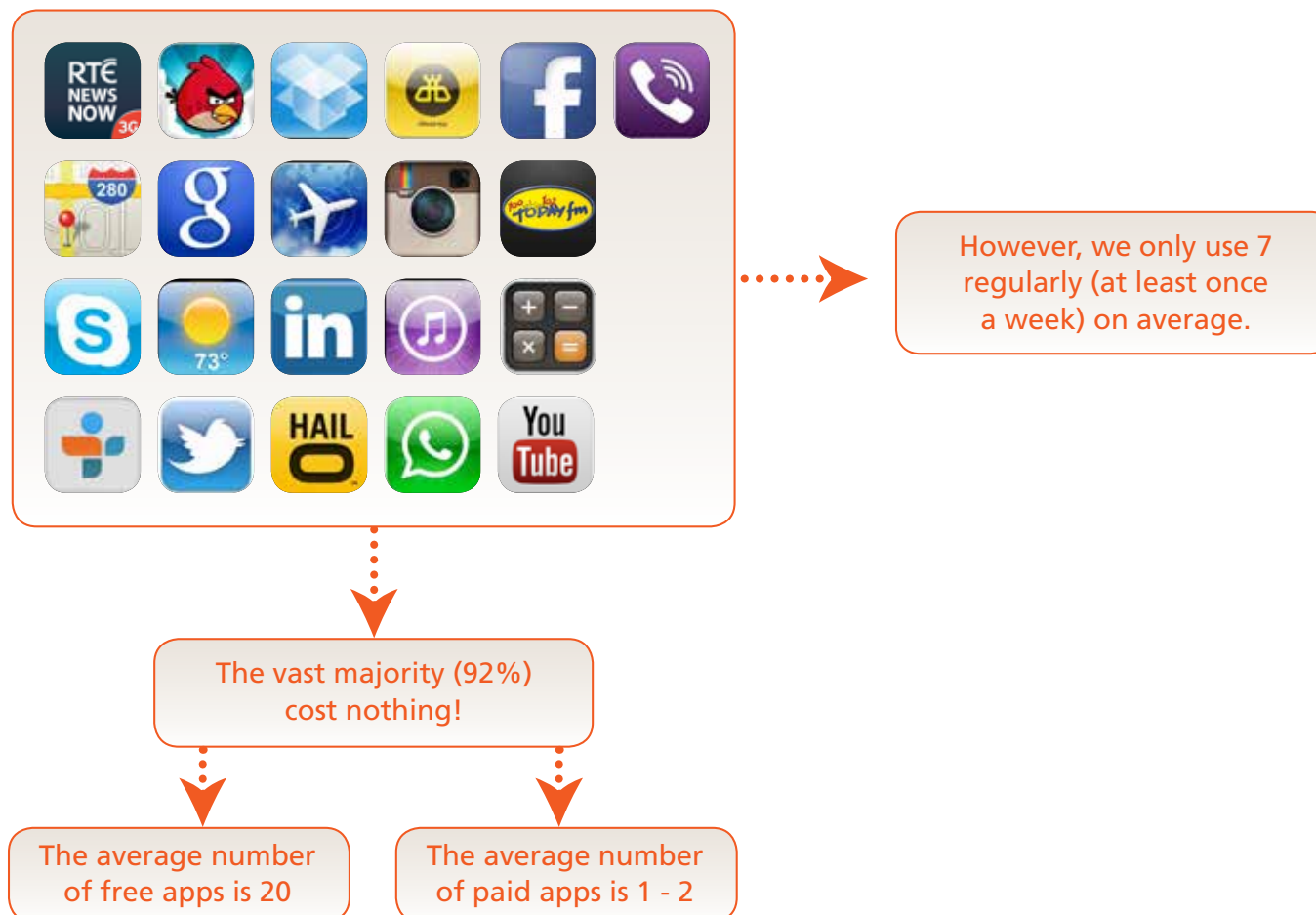
	Total	Gender		Age		Social Class		Region				
		Male	Female	-34	35+	ABC1/ F50+	C2DE/ F50-	Dublin	Leinster	Munster	Conn/ Ulster	Leinster (inc. Dublin)
Base:	440	221	219	247	193	254	186	131	119	111	79	250
	%	%	%	%	%	%	%	%	%	%	%	%
- ANY	70	74	67	72	69	80	60	76	72	59	74	74
Google search	59	64	54	62	56	70	48	59	64	51	63	61
Google maps	51	58	43	52	49	63	37	55	53	45	49	54
News/sports apps (e.g. RTE, Sky News, Irish Times etc.)	43	55	31	42	46	54	32	38	49	43	46	43
Any flight apps (i.e Aer Lingus app, Ryanair app etc.)	32	34	29	32	32	37	25	29	41	21	39	34
Any Travel apps	26	27	25	27	24	35	16	21	32	21	33	26
Apps to translate	20	21	18	22	18	25	15	21	24	14	19	22
Other	9	10	9	9	10	11	8	12	13	8	2	12
None of these	30	26	33	28	31	20	40	24	28	41	26	26

Question

When you are away (i.e. out of Ireland) do you use any of the following?

We only use 1 in 3 of our mobile apps regularly

21 is the average number of apps on mobiles



Question

Approximately how many apps do you have on your mobile phone?

After social networking, weather, video & news are the most popular apps



Question

Which of these types of apps do you have on your smartphone?

The top apps most addicted to

Base: All with apps - 440



45%

Google

6%



6%



5%



5%



4%

Males	Females	Under 35	35+
Facebook - 37%	Facebook - 53%	Facebook - 58%	Facebook - 29%
Sky Sports News - 9%	Google Search app - 7%	YouTube - 6%	Google Search - 8%
YouTube - 8%	Candy Crush - 5%	Twitter - 6%	Sky Sports News / RTÉ - 7%
Google Search app / RTÉ - 6%	YouTube / RTÉ - 4%	Google Search app - 5%	YouTube - 6%
Twitter - 5%		RTÉ / Sky Sports News - 3%	

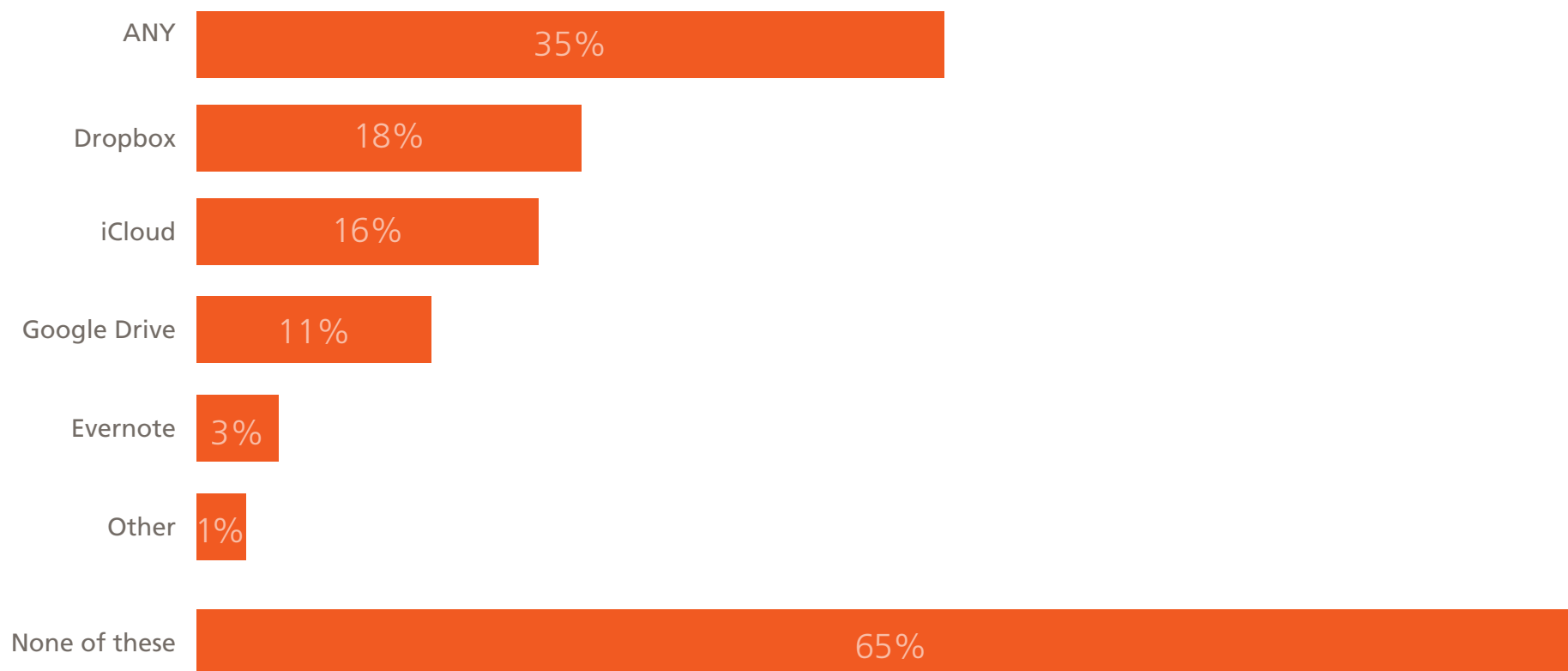
Question

Which app are you most addicted to on your smartphone?

1 in 3 now use Cloud apps

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Base: All smartphone users - 504



Key Themes

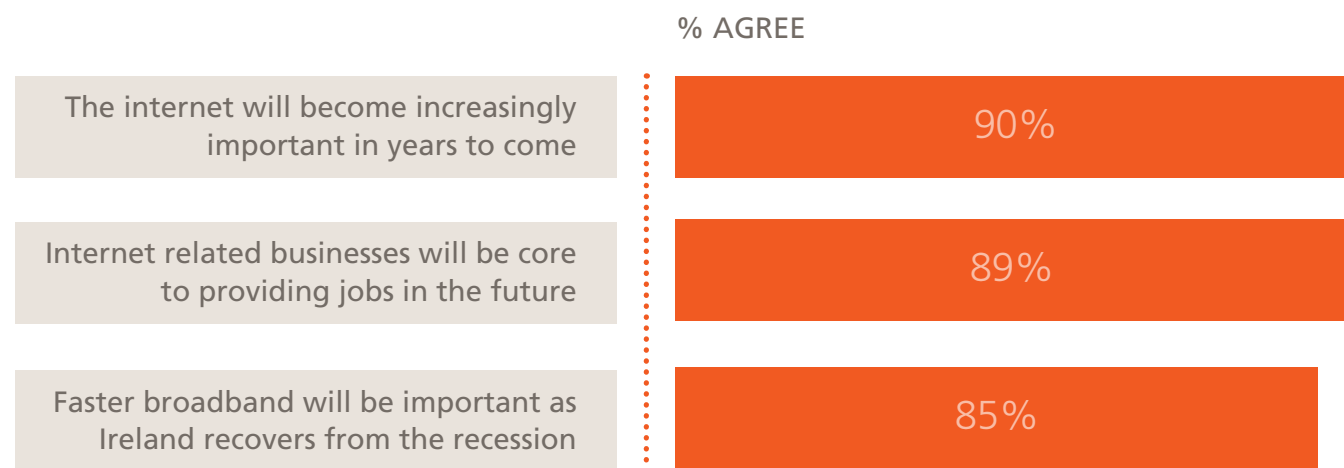
5. We just can't get enough... speed!



Virtually all feel the future for Ireland is faster broadband, with internet businesses being core to future jobs

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Base: All with smartphone - 504

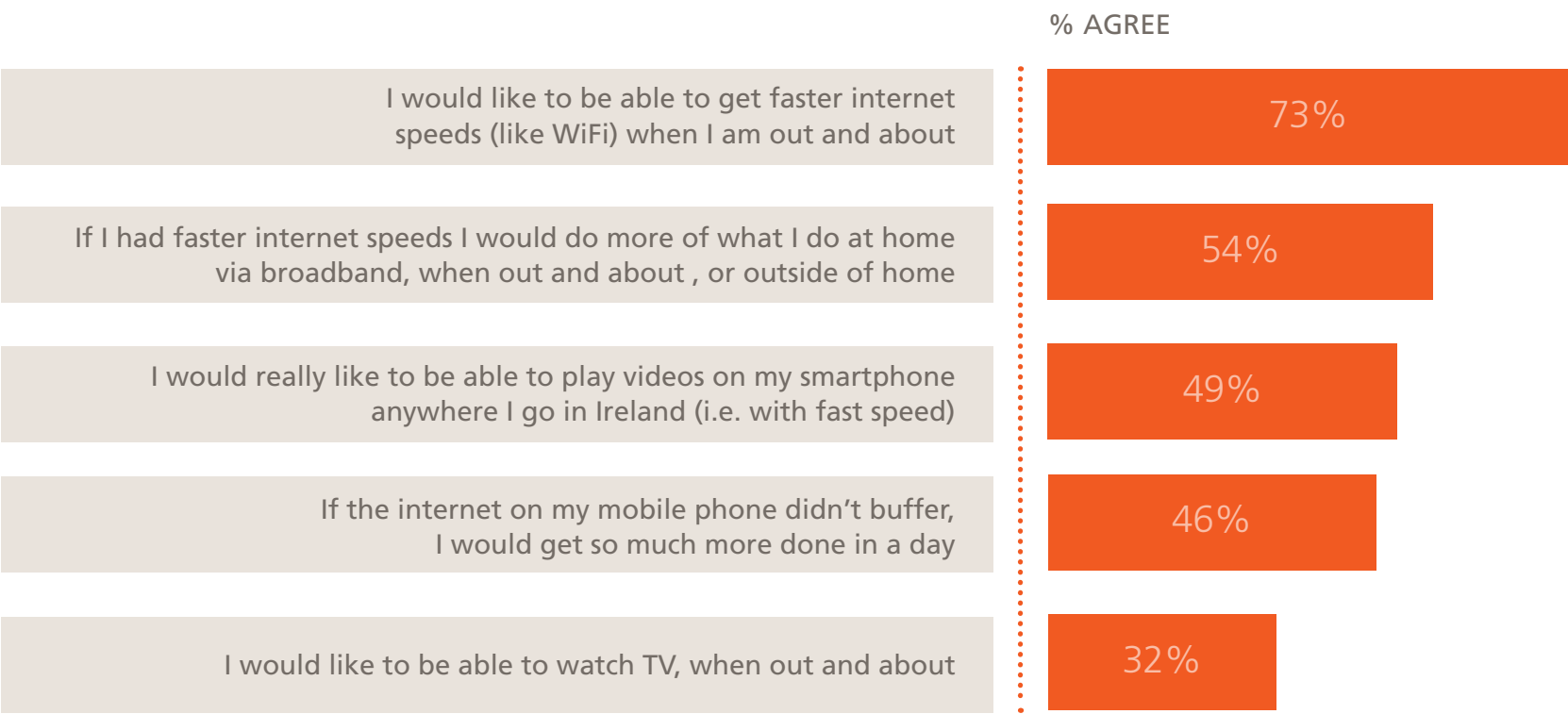


Question

To what extent do you agree or disagree with the following statements people have made...?

Fitting with our thirst for on-the-go devices is faster broadband on-the-go

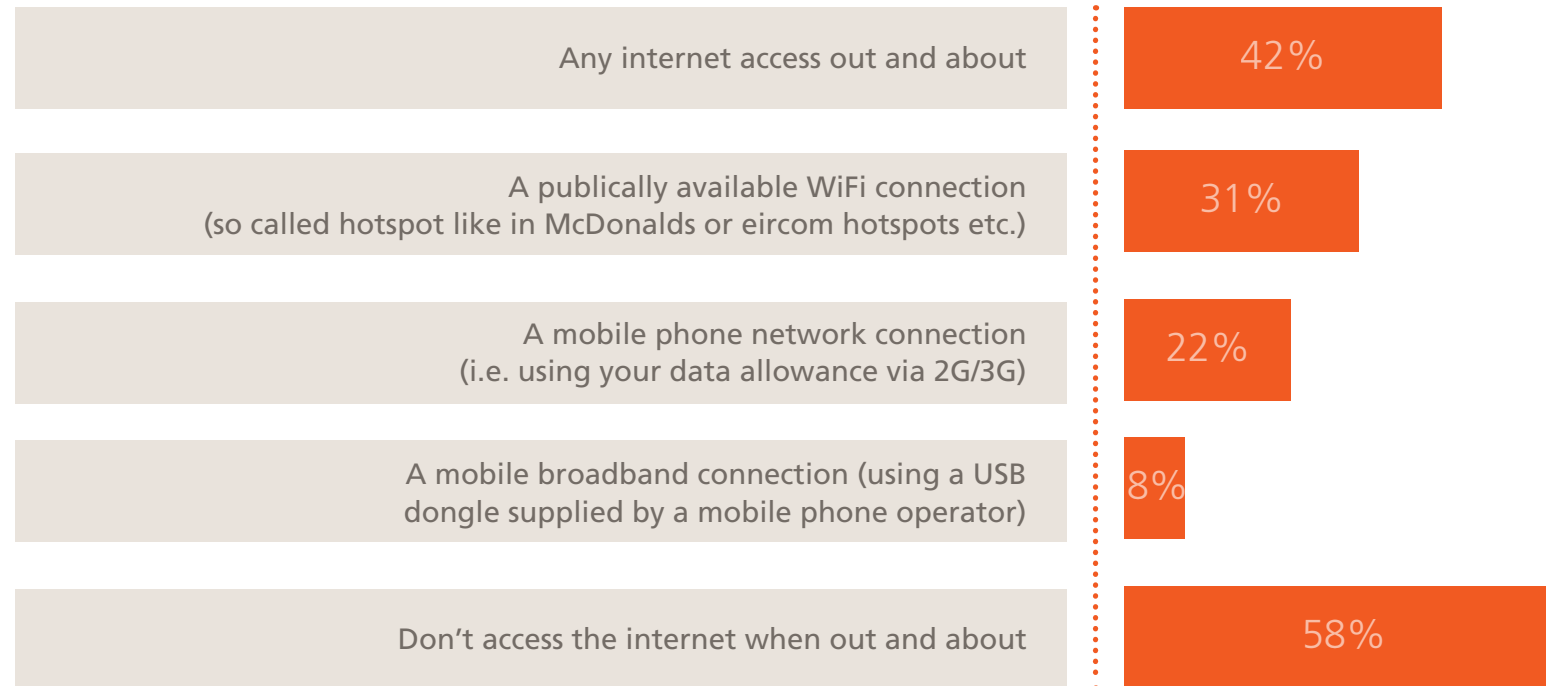
Base: All with smartphone - 504



Question To what extent do you agree or disagree with the following statements people have made?

Mentions of accessing internet out and about

Base: All adults 16+ - 1,003

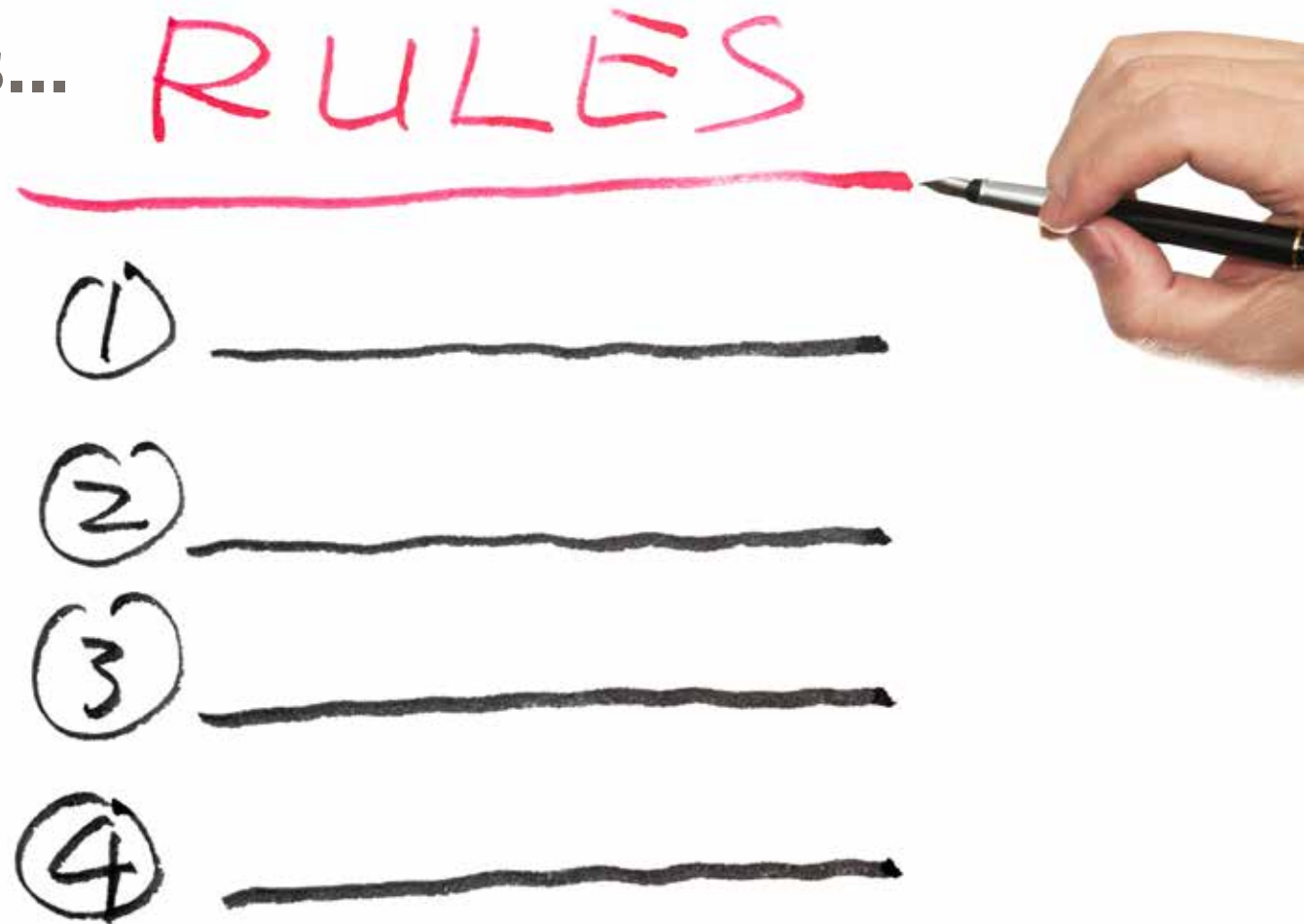


Question

Which of the following, if any, do you use to connect to the internet when out and about in public i.e. not at home, in work, in college/school and within Ireland?

Key Themes

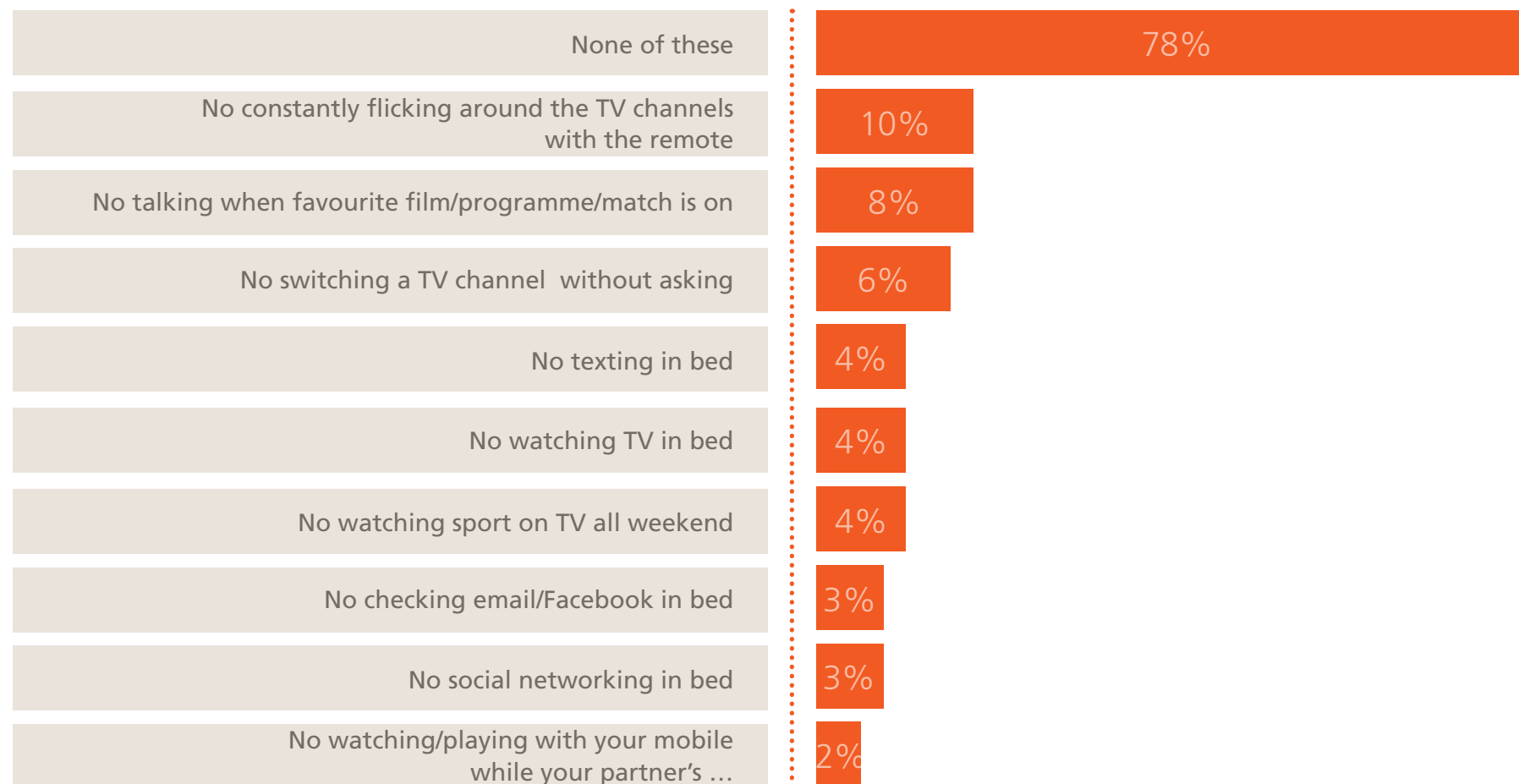
6. The Irish Rebel psyche
is alive - the first
technology rule is...
there should be
no rules



The first rule of technology....there should be no rules - 4 in 5 do not want curtailment of their technology usage

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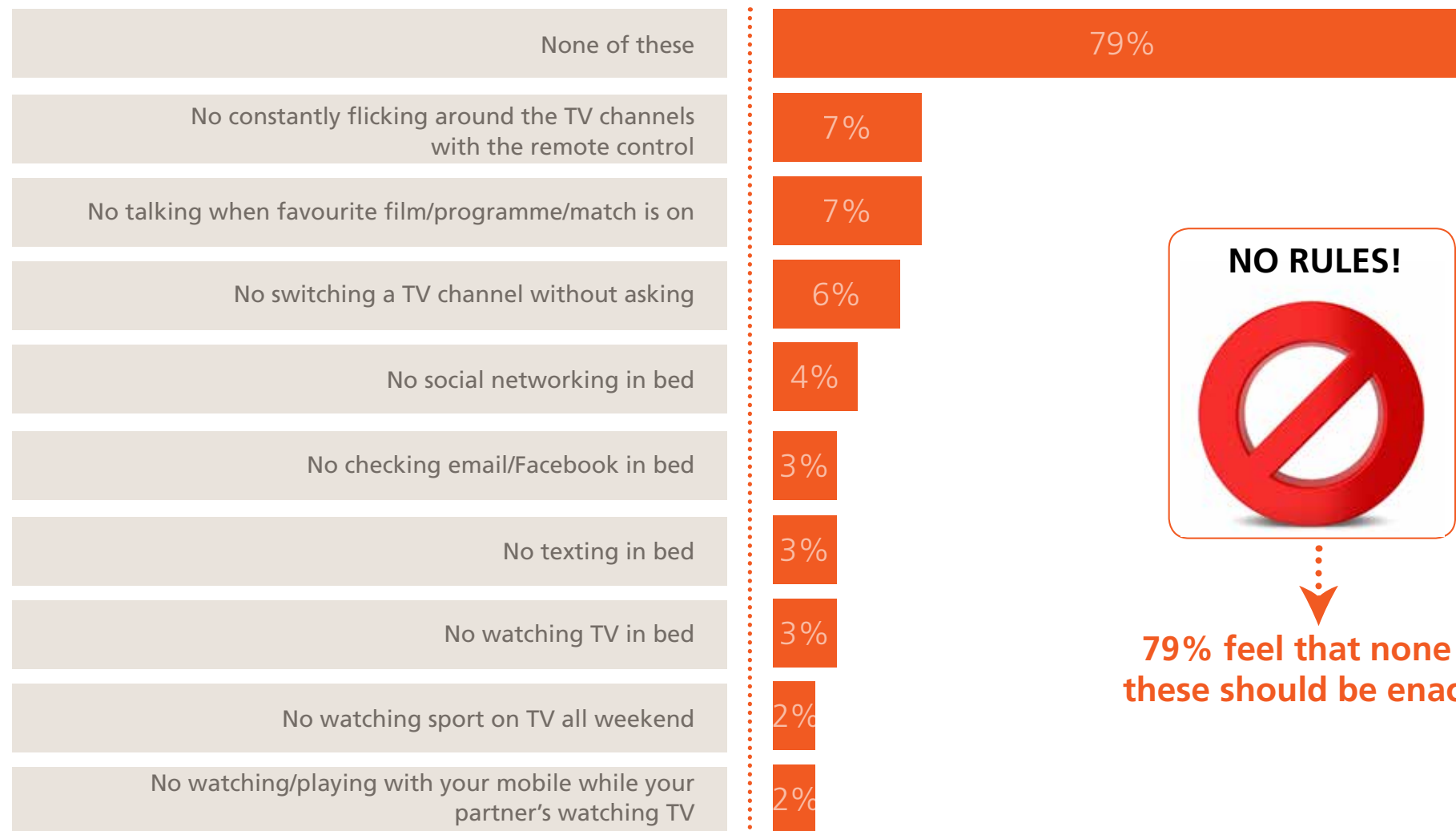
Current Rules



Are there any of the following technology rules in your household?

79% feel no technology rules should be in place in the household

Base: All adults 16+ - 1,003



79% feel that none of these should be enacted

Question And which of these rules should be in place in your household?

Key Themes

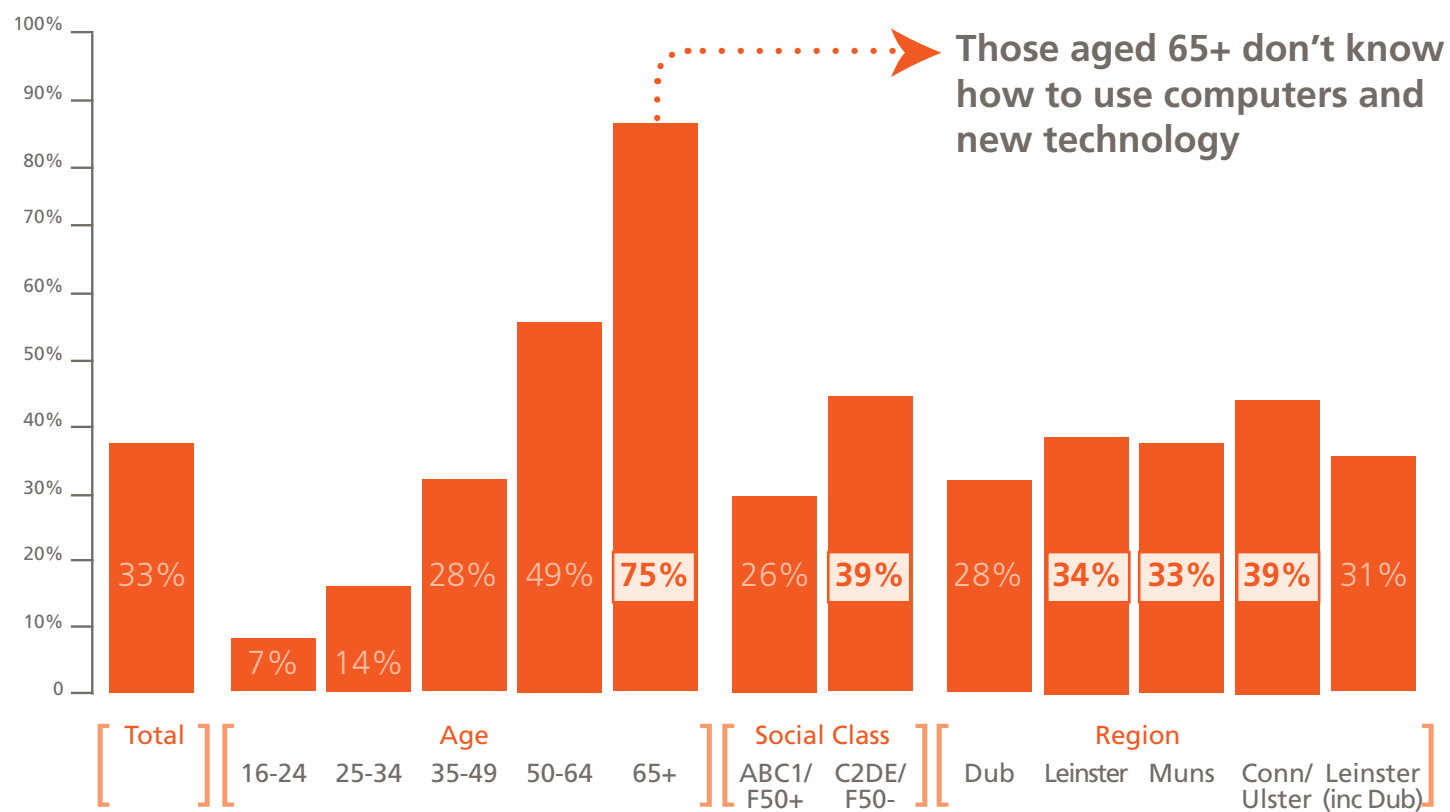
7. Technology education is still required



Education on technology still required for one third of the population – with an age and class divide evident

Base: All adults 16+ - 1,003

% AGREE: I just don't understand computers and new technology



Increase vs Feb '13

Question

How strongly do you agree or disagree with the following?

Key Themes

8. Technology - simplifying our lives, but be careful of dumbing down



Technology has made some things in life simpler

Don't have to visit a travel agent's office to book a holiday



44% of all adults

Don't have to go to a bank to do your banking (e.g. check balance, transferring money etc.)



45% of 16-34s

Don't have to watch TV shows at the time they are shown



37% of 16-34s

Don't have to search for jobs in newspapers



37% of 16-34s

But be careful of dumbing down

.....

Due to the advancements in technology...

Half of 16-34s feel they do not need to 'look something up in a dictionary'



Half of all adults (3 in 5 of 16-34s) claim they do not write letters any more



Half of all adults don't have to remember telephone numbers



39% of Smartphone users admit being 'economical' with the truth on social media



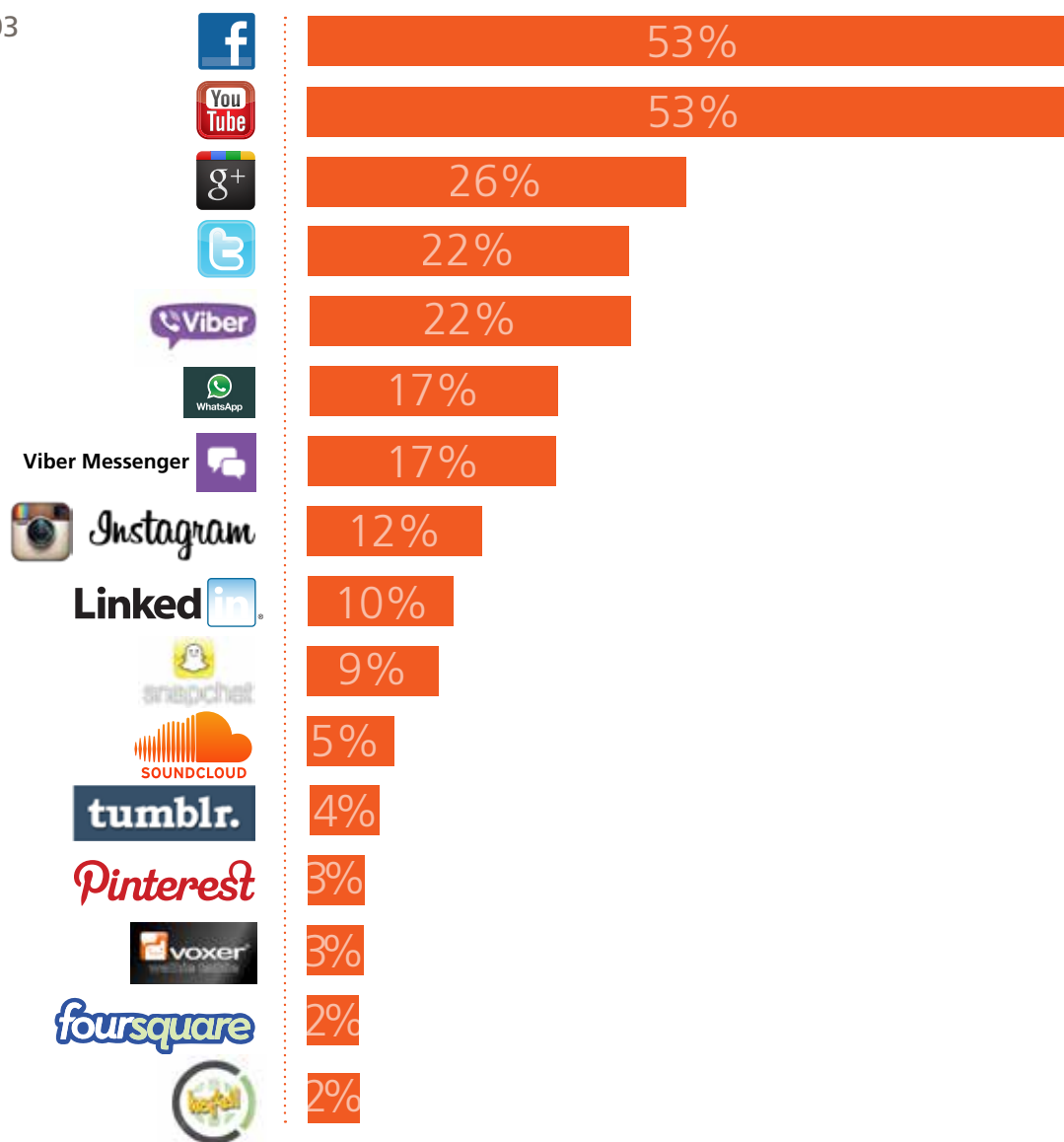
Key Themes

9. The role and value of social media is being questioned...with the blurring of what's really 'news'



Social media usage nowadays

Base: All adults 16+ - 1,003

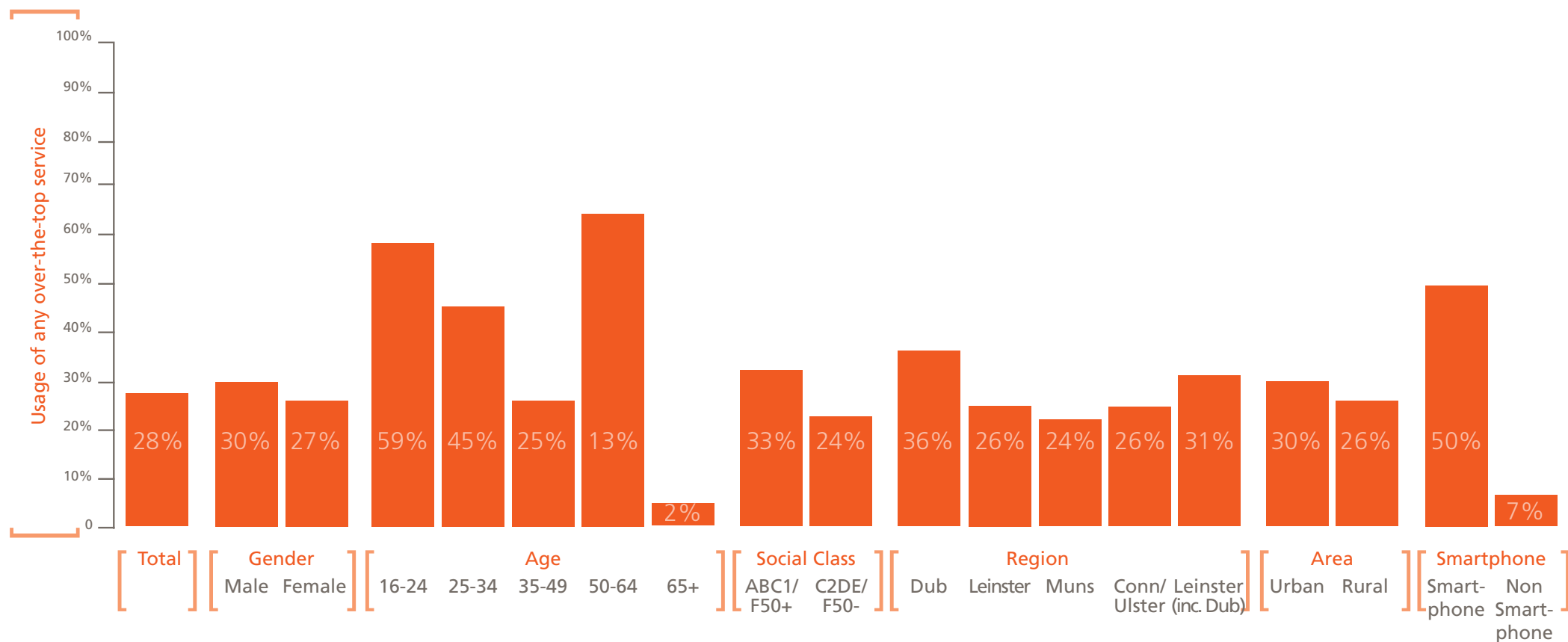


Question

Which of the following, if any, of these sites do you ever use nowadays?

28% of the population now use over-the-top services (half of smartphone users, almost 60% of 16-24s)

Base: All adults 16+ - 1,003






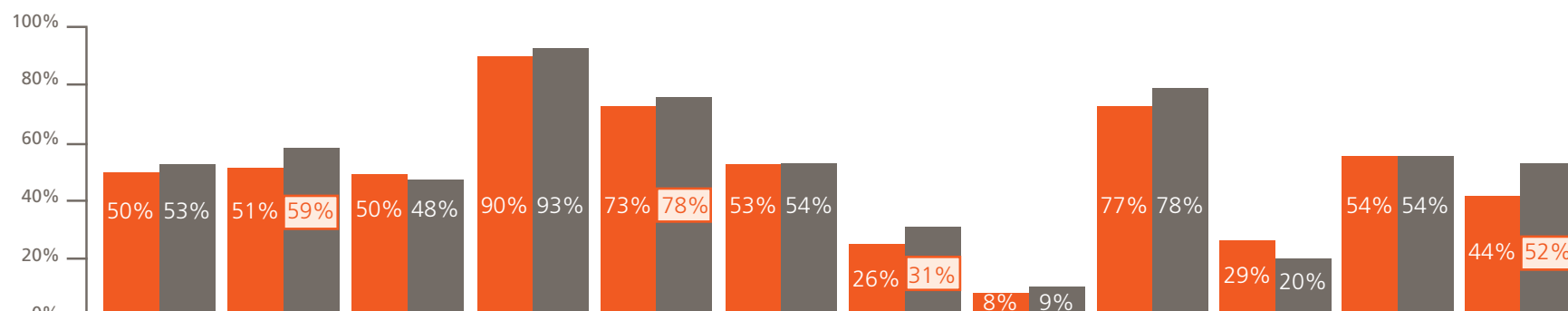
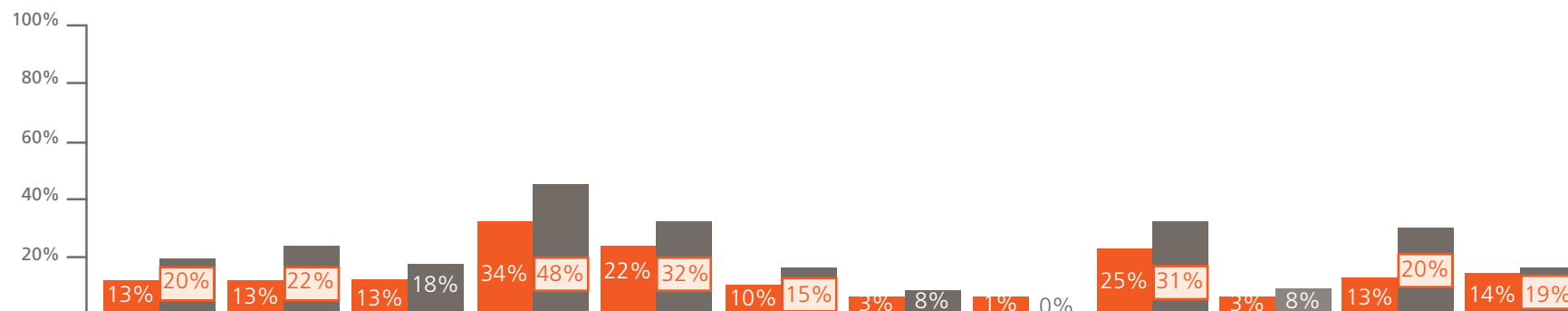
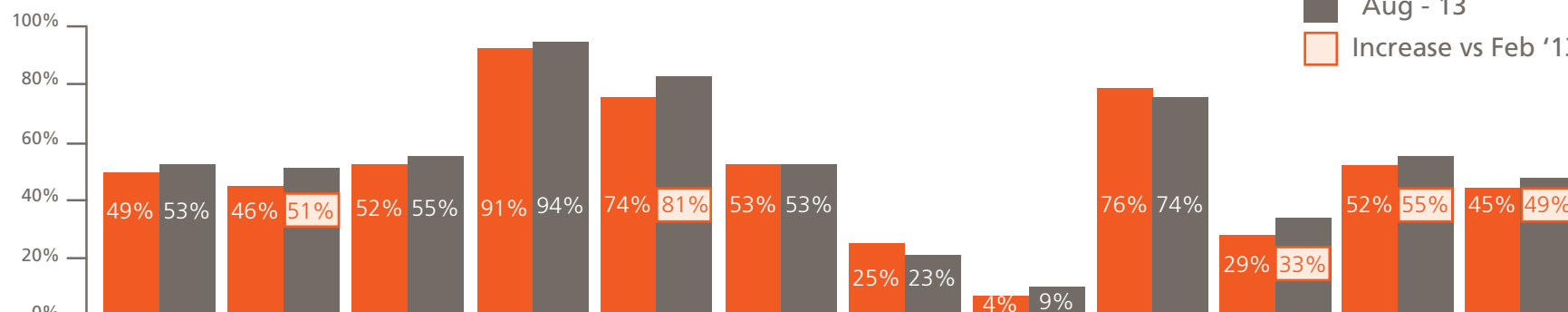
Question

Which of the following over-the-top services, if any, do you ever use nowadays?

Social media usage by key cohorts

Base: All Adults 16+

 Feb - 13
 Aug - 13
 Increase vs Feb '13

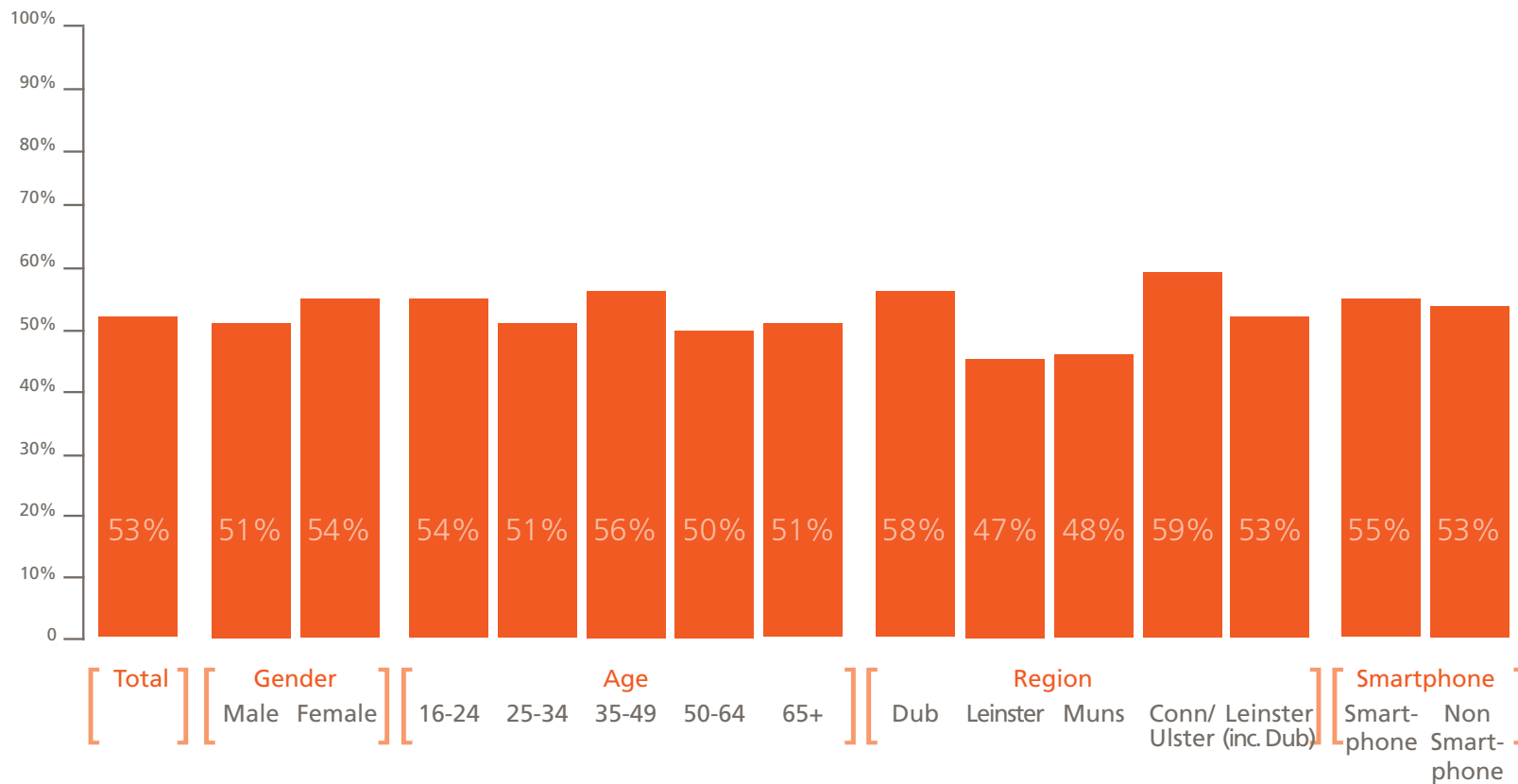


Which of the following, if any, of these do you ever use nowadays?

Half the population agree that the distinctions between real news and entertainment news are blurred

Base: All respondents

% AGREE: the distinction between real news and entertainment news has become blurred with the introduction of social media



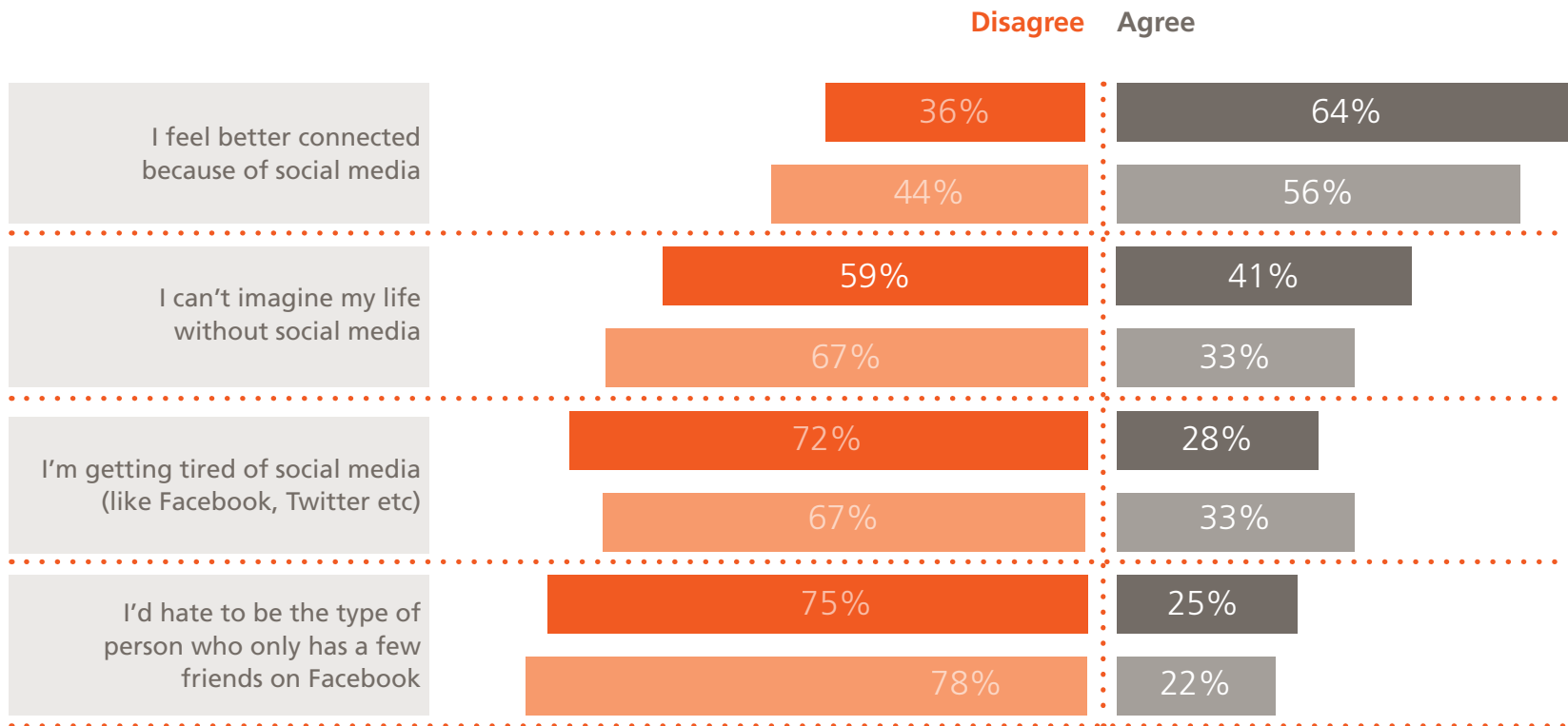
Question

To what extent do you agree that the distinctions between real news and entertainment news are blurred?

Females and 16-24s increasingly admit to getting tired of social media

Base: All using social media - 658

Feb - 13
Aug - 13



Here are some other things people have said about social media. Do you agree with these statements?

Relevance is the challenge for 35+, while social media cannot generate sufficient 'new info' to keep the attention of U35s

.....

Base: All getting tired of social media - 215

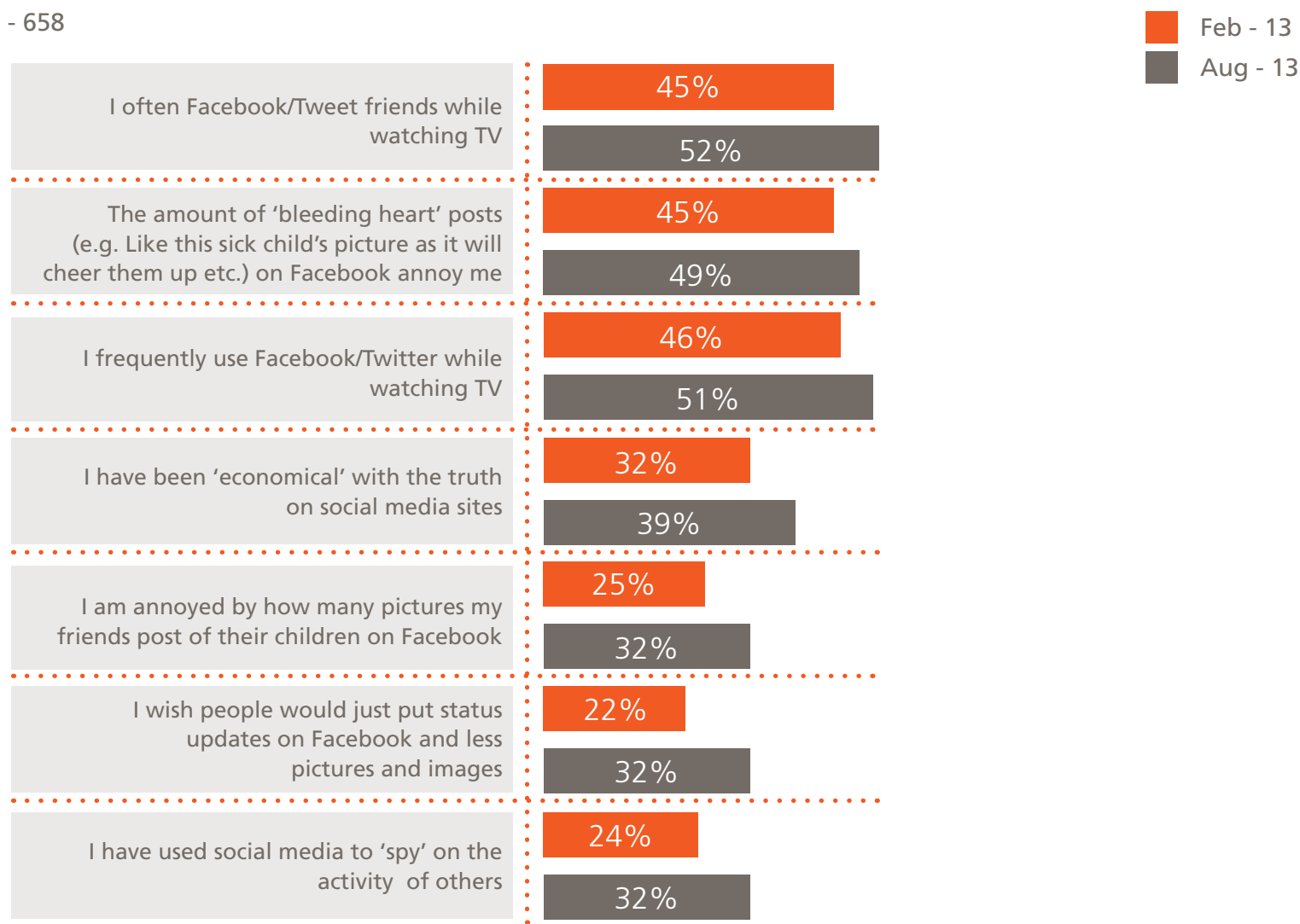
Reasons getting tired of social media	Total	Age	
		U34s	35+
Base:	215	90	125
There is a lot of information on there that is not important to me	50	41	56
It is the same stuff on there all the time	41	52	33
It is taking up too much of my time	19	21	17
My friends are using it less	6	9	4
Other	9	8	9

Question

You mentioned you are getting tired of social media. Is this because ...?

Social media encourages new behaviours but also frustrates

Base: Any social media users - 658



Question

To what extent do you agree or disagree with each of the following statements about social media?

Half of 16-24s admit to being 'economical with the truth' on social media. Women like to spy!

Base: All adults 16+ - 1003

	Total	Gender		Age					Region				
		Male	Female	16-24	25-34	35-49	65+	50-64	Dublin	Leinster	Munster	Conn/ Ulster	Leinster (inc. Dublin)
	%	%	%	%	%	%	%	%	%	%	%	%	%
I often Facebook/Tweet friends while watching TV	35	31	38	74	56	31	13	1	37	29	33	43	33
The amount of 'bleeding heart' posts (e.g. Like this sick child's picture as it will cheer them up etc.) on Facebook annoy me	35	36	33	57	50	35	21	6	40	33	32	32	37
I frequently use Facebook/Twitter while watching TV	34	31	36	75	58	27	11	1	35	29	33	39	32
I have been 'economical' with the truth on social media sites	27	25	28	53	45	24	10	2	25	25	23	37	25
I am annoyed by how many pictures my friends post of their children on Facebook	23	24	23	24	32	27	21	6	27	23	19	26	25
I wish people would just put status updates on facebook and less pictures and images	23	23	23	29	29	28	19	4	23	24	21	24	24
I have used social media to 'spy' on the activity of others	22	17	26	43	39	18	7	1	26	17	21	22	21

Key Themes

.....

10. Interesting factoids



Have you ever ...?

Apologised via text
for not calling



67% of
16-34s

Called or texted someone
you knew you shouldn't
have when drunk



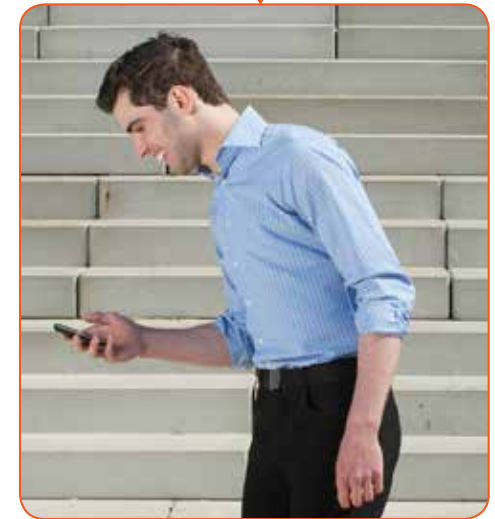
44% of
16-34s

Take/make calls/texts/emails
while on a toilet



55% of
16-34s

Walked into something while
checking your mobile



67% of
16-24s

Have you ever ...?

Sent a text/email/Facebook post that you shouldn't have when back in from a night out



36% of
16-24s

Sent an email in the heat of the moment and regretted the tone afterwards



34% of
16-34s

Sent an email you didn't mean to or want to by hitting 'reply all'



30% of
16-24s

Have you ever ...?

Searched online to diagnose symptoms when you feel ill



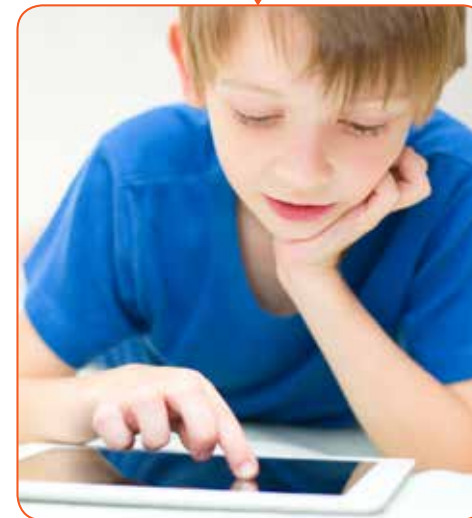
60% of 25-34s
47% of females
38% of males

Searched online to diagnose symptoms when your children feel ill



51% of parents with children 5-12 years

Given a child a device (e.g. mobile/tablet etc) to keep them quiet



46% of parents with children aged 5-7 yrs

Have you ever ...?

Flirted using
text message



55% of 16-34s

Texted in sick to
work/school/college



32% of 16-24s

Checked your children's
mobile phone texts



35% of parents with children
aged 13-47 yrs

'Stolen' WiFi from
your neighbour



20% of 16-24s

Gone into a café/hotel to charge
your mobile/laptop



29% of 16-34s

Purposely hidden
the TV remote



38% of 16-24s

Have you ever ...?

Fallen asleep using a computer/
laptop or mobile phone



59% of 16-24s

Fallen asleep
watching TV



71% of all
adults 16+

Accidentally told someone the
score of a match they recorded
to watch later



44% of 16-24s
27% of males

Thank you

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